



## Course in Mining Supervisor

Unit:

**RIICOM301D**

**Communicate Information (s3)**

## Student Study Guide

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# 1.0 Organisational Communication

## Introduction

Communicate information orally is part of the Certificate of Site, Safety and Health Representative course and is designed to give you the skills and knowledge to be able to communicate effectively in the workplace.

Verbal communication is essential to make yourself understood during everyday working activities. Poor expression can lead to misunderstanding which at the very least will affect efficiency and may even cause a dangerous situation.

This section will look at the importance of communication in general terms and then examine oral (verbal) communication in more detail.

## Effective communication in the workplace

Understanding how communication flows in your workplace enables you to participate in effective communications. This is important if you are to perform well in your job.

Effective communication also benefits all of your co-workers and the workplace as a whole. It is to everybody's advantage to strive towards effective communication.

### Benefits of Effective Communication

1. Employees feel that they belong and are involved in the workplace
2. Promotes commitment
3. Enhances morale
4. Saves time
5. Saves effort
6. More efficient working environment
7. Increased cost effectiveness
8. Creates team spirit
9. Able to work as a team

Opportunities for career advancement are improved with effective personal and workplace communication skills.

Communication is a vitality important factor of everyday life. We rely on our ability to use communications to convey all of our feelings, thoughts and messages to many people in a range of situations.

Communication in the workplace is of equal importance. If we are to achieve a cooperative, positive working environment, we must have effective and efficient communications.

Communication in the workplace takes many different forms, depending on how work is organised in your office. Therefore, it is important to understand:

1. How the workplace is organised.
2. How the communication flows within the organisation.
3. How you can communicate effectively within your workplace

### ***Communicating efficiently***

The most important factor in communicating is being effective. This means that your communication must be appropriate, delivered to the right person and done in a time efficient manner. Working environments do not accommodate communication that is too long or too late. It is essential that the time being used in communication messages is used well, and that resulting actions are undertaken whilst using time efficiently.

The communication process

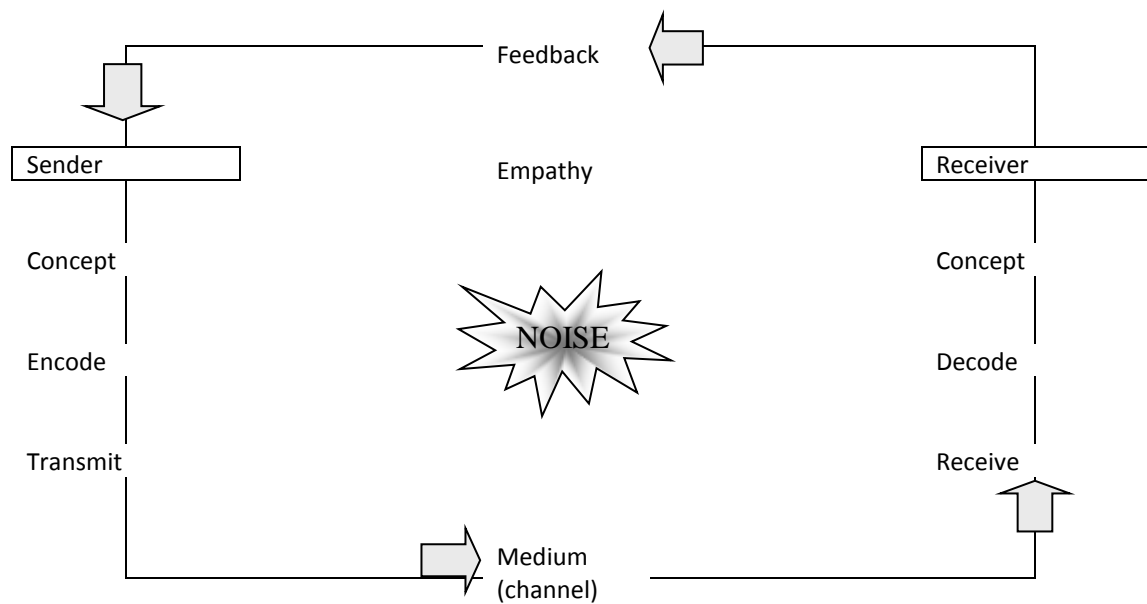
A definition of 'Communication' could be:

**"The ability to transfer a message from one individual to another for understanding".**

From this definition we can see that communication is the sending of a message from one person to one or more others. Communication can be said to occur when understanding of the message is gained. Feedback is the mechanism that lets us know understanding has occurred. This includes actions such as nodding of the head in agreement, asking or answering a question or seeking clarification.

Feedback for understanding enables communication to be two-way. Unless communication is two-way, we can never guarantee that the message or resulting actions will be accurate. This lack of guarantee is not acceptable in a workplace.

## The Communications Model



The elements of this model can be described as:

Sender	person sending the message
Receiver	The person to whom the message is sent
Concept (Sender)	The message
Concept (Receiver)	The receiver's interpretation of the message
Encode	The language used to convey the message
Decode	To translate the message from the language of the sender to the language of the receiver
Transmit	Physical or technical delivery of the message
Medium	The means by which the message is sent (eg, written instructions, talking on the telephone)
Receive	The physical or technical arrival of the message
Feedback	The method by which the receiver lets the sender know that the message has been received (i.e., answering a question, nodding head in agreement, restating what has been communicated)
Noise	Interference. Anything that interferes with the clear understanding of the message (i.e., poor listening, people's attitudes, language difficulties, loud noises)
Empathy	The ability to be able to understand the message from the point of view of the sender (i.e., "putting yourself in the other person's shoes")

## **Communication within organisations**

All workplaces are organised differently. The different organisational structures affect the way the communication flows within the workplace. Some organisations are very large, others small. The size of an organisation is not necessarily related to how effectively communication flows within it.

### Organisational Structures

Workplaces are generally organised hierarchically or as teams. It is important for you to understand the organisational structure of your workplace so that you can identify the communication flow.

## **Language**

Language is the means we use to transmit our message to others. Using the wrong language (offensive, confusing, culturally inappropriate etc) will destroy our interpersonal relationships with others. This in turn will affect our working relationships.

Language is made up from both:

- Verbal (spoken language)
- Non-verbal (body language).

Verbal language is the words and expressions we use to convey our message to others.

Non-verbal language is the way we use our voice and body language to:

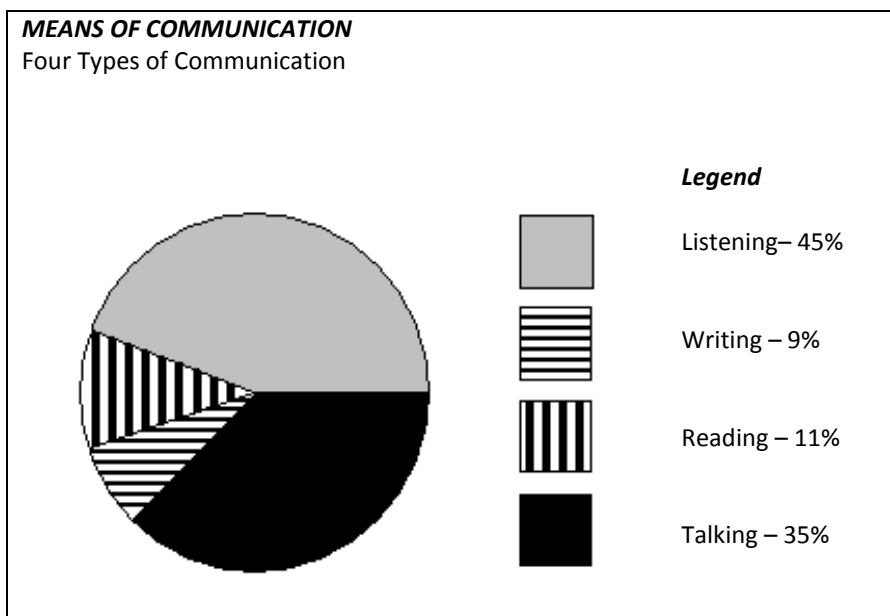
- Reinforce the spoken word (use a pointed finger for example)
- Modify the spoken word to give a particular meaning (smile or frown for example)
- Distort the meaning of the spoken word (use a sneering voice or shrug your shoulders).

There are also two components to the oral communication process; there is the person who does the talking and the person who does the listening. Both of these are of equal importance when it comes to effective communication. You must be as good at listening as you are at talking.

## **Listening and talking**

People communicate in a variety of ways in the workplace. Four types of communication are writing, reading, listening and speaking.

Think about your workplace and the ways in which these four methods are used to communicate. Which methods do you feel would be most commonly used? Of the four methods listening and talking are used 80% of the time.



### Speaking Skills

We learn to talk as young children and as we mature we develop our speaking skills to become increasingly competent at conveying our messages clearly. As talking makes up a large percentage of our communication, it is necessary that we continue to develop effective speaking skills.

Unless we are able to speak clearly and organise our ideas well, our communication will breakdown. Those we intend to communicate with will be unable to interpret and understand our message. As the information we need to pass on becomes more complex, the need to think about how we present it becomes increasingly important.

In your workplace you will be aware that much of the communication that goes on involves speaking and others listening and responding. Information and instructions are regularly passed from one person to another, eg someone may explain to you how to use a new piece of equipment.

### Giving instructions

At various times all people in a workplace are required to give instructions to others. If this can be done well, it increases efficiency in the workplace. If instructions are not clear, resulting in tasks not being completed satisfactorily, time is wasted as the instructions need to be given again, the task needs to be repeated and unpleasant tension may arise.

Being able to give clear instructions that are easily understood is a skill developed over time. An effective communicator will give considerable thought to the way he/she gives instructions and ensure that they are presented in a manner that is readily understood by those receiving them. Presenting instructions in a pleasant, cooperative manner whilst informing the recipient of the importance of the information will generally lead to improved cooperation and acceptance of the information.

### Spoken Instructions

In a workplace many of the instructions are given verbally. If we are to be proficient at giving verbal instructions, it is necessary to have well developed speaking skills. Many people are nervous and hesitant if they have to speak to more than one person at a time, however speaking skills can be improved with practice and knowledge and nervousness can be overcome.



### Attitude

When you find yourself in a situation where you need to give verbal instructions to one person or a group of people have a positive attitude, rather than thinking, 'this is going to be awful and I'm sure to mess it up', see the task as a challenge and tell yourself you'll do a great job. If you are nervous take a few deep breaths before beginning to speak. Have a smile on your face, be enthusiastic and encourage those you're speaking to, to ask questions. Answer questions in a pleasant, encouraging manner.

### Body Language

Body Language conveys a great deal of information. When speaking try to have a calm relaxed stance. If you appear nervous and fidgety, those you are speaking to become tense and worried for you. Be aware of any distracting mannerism that you may have.

It is difficult for someone to concentrate on what you're saying if you constantly tap your pen or pull your ear. Remember that our body language often conveys a stronger message than our words. If we appear hurried and impatient, this message will be far stronger than saying we have time for questions.

### Voice

Our voice is very important in conveying a clear message. Mumbling or mispronouncing words will make us difficult to understand. The tone of our voice is also important. Speak in a pleasant, friendly tone. People are more inclined to listen if we do this. Voice should be used to emphasise any key points such as safety factors.

### Demonstrate

People gather information through their eyes as well as their ears. When giving instructions, it is extremely helpful to demonstrate the task at the same time. This enables the receiver to gain the information by two media, each one reinforcing the other.

### Steps for Clear Instructions

#### **1. Set the Scene**

Give the person a general picture of the task and its importance. If a person understands why they must complete a task in a specific way they are more likely and follow the set steps rather than trying to find short cuts.

#### **2. Check Knowledge**

Before launching into a detailed explanation of each step find out exactly what the person already knows. By doing this you avoid boring a person and perhaps turning them off by going over material with which they are familiar. This will also prevent you from assuming that your listener has some necessary prior knowledge that they may not have. You may need to fill in details before beginning the instructions. At this time you can assess the person's command of English, and knowledge of any jargon, and so adjust your language accordingly.

#### **3. Explain**

Having thought about how best to present your instructions, now explain to the person how to complete the task. Be sure to present the information in clear short steps, always asking for feedback and checking that the person has fully understood what is being explained. Where possible, it is always a good idea to demonstrate the task Show the person how to complete the task in small steps so that he/she can grasp each step before moving on to the next. Encourage the person to ask questions.

#### **4. Check**

Once you've explained and demonstrated the task it is necessary to ensure that the person has understood all that you have presented. Avoid just asking if he/she understands as you may well just receive a nod or a vague 'yes'. Check that they've understood.

- a. Ask the person to explain the task to you in order to demonstrate that they understand all the steps involved.
- b. Ask the person to perform the task and at the same time explain what he/she is doing

Use these opportunities to ensure that the person has fully understood your instructions and at the same time stress any important details.

After allowing the person to work on the task alone, it is a good idea to re-check that they have understood and remembered all details.

### Manner

When giving instructions always keep in mind the person who is to receive them. Present instructions in a pleasant, courteous manner so that the person feels comfortable and relaxed. No one can absorb information if they feel stressed and pressured. Ensure that there is adequate time for information to be absorbed and think about how you can check for understanding.

If an instructor says gruffly, “you should have got that now”, only a brave person would ask for further explanation. However, if an instructor says, “I’m not sure if I’ve made that clear, do you have any questions?” a person will feel more at ease to ask questions.

Practice your skills in giving verbal instructions by completing the following exercise. Use a voice recorder to tape your instructions.

A work experience student is currently working in your workplace. You have been asked to instruct the student how to use a two-way radio.

1. Write your instructions on paper
2. Switch the voice recorder on and record your instructions clearly on the voice recorder
3. Listen to the voice recorder carefully.
4. Complete the following evaluation sheet. Circle the appropriate answer.

#### **EVALUATION SHEET**

- |   |     |    |
|---|-----|----|
| 1. Did you check the person’s prior knowledge?                  | YES | NO |
| 2. Did you set the scene before beginning to explain the steps? | YES | NO |
| 3. Were your instructions presented in logical steps?           | YES | NO |
| 4. Did you leave out any information?                           | YES | NO |
| 5. Was the language used clear?                                 | YES | NO |
| 6. Did you check that the person understood your instructions?  | YES | NO |

Explain ways in which the instructions could have been more clearly presented.

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## Listening skills (receiving instructions)

While it is important to be able to give instructions, it is equally important that we are able to effectively receive instructions.

A great deal of our time is spent listening. If we are to work efficiently we need to be able to use our listening skills effectively so that we are able to quickly grasp and understand information and instructions.

When you are being instructed about the process of completing a task it is necessary that you:

- Listen
- **Ask questions** to ensure that you've fully understood and clarified details.
- Check your understanding with the instructor. Paraphrasing or restating what the instructor has said is an effective means of doing this, eg saying, "after I've turned off the red switch I then..." enables the instructor to immediately assess how well you've understood.
- **Carry out the task.** After checking that you've understood the task work through it. Satisfactory completion of a task is a true test of your understanding.

Instructions such as the following are not very clear:

- "put it up high"
- "file it away"
- "find out about..."

Before these instructions could be satisfactorily carried out, more information would need to be given or the person would be guessing as to exactly what was meant.

Listening is a skill that we spend a great deal of our life doing. It is an important skill, but also a difficult one. If, however, we are to become effective communicators, we must have well developed listening skills. This is especially true in the workplace, as poor listening skills can lead to serious breakdowns in the communication process.

Listening is more than just hearing. It is an active involvement in the message being transferred to you.

### Why is listening important?

1. We need to know what is expected of us.
2. It shows courtesy and respect for the sender.
3. We can learn from listening.
4. If we listen to the sender, then they are more likely to listen to us.
5. listening demonstrates you are paying attention.
6. Listening encourages further communication.
7. It allows us to select an appropriate response or feedback.

Unfortunately, barriers can often exist that prevent effective, active listening from taking place. These barriers either reside in the listener (mental barriers) or in the environment (physical barriers).

### **Barriers to Effective Listening**

#### ***Mental***

1. I'm impatient/too busy
2. I'm distracted by my own worries
3. I'm not interested
4. I already know this
5. I don't (want to) understand
6. I don't like you
7. I don't want to hear what you've got to say

#### ***Physical***

1. Noise
2. Temperature
3. Time
4. Light
5. Furniture or other objects
6. Closeness, physical proximity

The ability to effectively listen is an important workplace communication skill. Good listening skills in one person encourage improved listening skills in others. It also enables enhancement of work performance.

### **Guide to better listening**

1. Stop talking
2. Put the sender at ease
3. Show the sender you want to listen
4. Remove distractions
5. Empathise with the sender
6. Be patient and calm
7. Remain open-minded
8. Ask questions
9. Seek clarification as needed
10. Always work at listening!



## ACTIVITY

Complete the following survey to determine the actual nature of your current listening skills. Place a tick in the column that most accurately reflects your listening behaviour.

	Usually	Sometimes	Occasionally
1. Do you physically attend to the speaker- i.e. face them, make sure you can hear, and stop what you are doing?			
2. Do you make appropriate eye contact with the sender?			
3. Do you listen to their message, rather than worrying about how they appear?			
4. Do you concentrate on what the sender means i.e. underlying thoughts and emotions?			
5. Are you able to neutralise your own feelings and thoughts?			
6. Do you resist jumping in with a response/reply too early?			
7. Do you try to empathise i.e. understand the message from the sender's point of view?			
8. Do you avoid trying to always have the last word?			
9. Do you attempt to analyse whether the message is plausible and realistic?			
10. Do you provide feedback for the sender?			
11. Do you seek clarification if all or part of the message is unclear?			

From completing this survey you are able to get a clear indication of particular aspects you need to work on to improve your overall listening skills. Ideally all of your answers should be in the 'Usually' column. Where answers appear in the 'Sometimes' or 'Occasionally' columns, you need to actively work upon improving your listening skills.

## Questioning

Questions are used to find out additional information. Questions can be divided into open or closed questions.

**Open questions** are broad questions that encourage the speaker to elaborate and give a detailed response. Such questions don't enable the speaker to respond with a simple 'yes', 'no' or one word answers. These questions are an effective means of gaining a great deal of information about a task. A question such as, "could you please explain how to change the paper in the photocopier?" will enable an Instructor to give detailed information about how to carry out the task. Such a question will give a much clearer picture of what to do than asking a series of closed questions such as "Do I open the machine here?" "Do I use this paper?" It often takes practice to learn how to phrase open questions.

**Closed questions** are specific questions and generally only have one correct answer, which is often just one word. Closed questions are useful when trying to find out specific details when you don't need to be given lots of unnecessary information. If you were operating a photocopier and were unsure which button to press to enlarge a copy, you may ask a simple closed question to receive this information eg, "is this the button which enlarges copies?" The response would be a simple 'yes' or 'no'.

Closed questions may be effective if, after asking some open questions, you've reached an understanding of how to complete a task but are still unsure of a particular detail. A short closed question can result in a quick response to your query.

## Checklist

Complete the following checklist to see if you have understood the material so far.

### Checklist

1. Do you know why it is so important to put information in logical order when giving instructions? YES / NO
2. It is important to give instructions in a polite and courteous manner. Do you know why?
3. Can you explain why it is important to give instructions in clear, concise English appropriate to each situation? YES / NO
4. Can you identify three ways you can check your understanding of instructions? YES / NO
5. Can you identify the difference between an open and a closed question? YES / NO

YES / NO

## **Non – verbal communication**

In considering how we and others communicate in the office environment, we must also look at non – verbal communication. The most common element of non – verbal communication is body language. Body language is not what we say (i.e. words); rather it is how we actually deliver our message. Our message can be delivered by the tone of our voice, the look on our face, how we position our body in relation to the other person, or eye contact.

Body language is usually unconscious, i.e. we do not plan our non-verbal behaviours, and they are instinctive. Our body is behaving according to how we actually feel. People are natural readers of body language. We often 'feel' that someone is being dishonest, yet they have not actually said anything to suggest this.

### **Examples of body language**

Because a large part of the messages we receive from others is based often subconsciously on non-verbal signals, we should try to be aware of what they are. They can often reveal quite a lot about the attitude of a person that can be very different from what is said.

In reading body language watch the other person's gestures and behaviour patterns. Note that no single action is sufficient to indicate subconscious feelings. Review the total behaviour within the context of the situation.

Some of the attitudes that can be revealed by body language are:

- Open receptive attitude can be revealed by:
  - Arms open, coat unbuttoned
  - Hand open, palms exposed
  - Body square and leaning forward.
- Closed defensive attitude can be revealed by:
  - Arms closed, palms hidden
  - Legs crossed, fists clenched
  - Body turned away.
- Interested
  - Eyes/pupils opened slightly
  - Eye contact increasing and head tilts
  - Arms uncrossed
  - Legs uncrossed, feet flat on floor
  - Body square and leaning forward.
- Not interested
  - Opposite to the above
- Deception
  - Look for mixed signals such as a contradiction between the spoken word and body language.
  - Evasive eye contact
  - Decrease in gesticulation
  - Increase in hand to face contacts
  - Body turned away



*Body language is a very powerful way to reinforce, emphasise, convince and even to create motivation. If you are aware of the various impressions you can convey with different body postures then you can make sure that your body language supports the verbal message you are communicating.*

## **Telephone Technique**

Most work environments are heavily dependent on the telephone as an important and efficient means of communication. Telephones have many advantages: they are instant; you can speak to someone who is a long distance away, as easily as speaking to someone in another part of the same building. Telephones also save time. Issues can be clarified over the phone; this reduces travel time and possible unnecessary delays.

Telephones are also an essential first point of contact with many people external to your company. People ring to determine if they are dealing with the right person or organisation.

Given the prominent role of the telephone in the office environment, it is important that it is used to optimum effect. Your telephone technique is a critical component of your ability to perform well in your job.

## **Using Telephones Effectively**

### Courtesy

You must be polite and respectful on the telephone on all occasions. Lack of courtesy can prevent any significant or meaningful communication being transferred in the course of the phone call.

### Greeting

The greeting both senders and receivers use when on the telephone is the first impression we get of each other. This impression can determine the success of the remainder of the conversation.

There are some differences between the type of greeting you would use depending on whether you were making, or receiving the phone call. Courtesy must, however, be ever present in both situations.

### Answering Incoming Calls

- a. You must acknowledge the call in the context of the time of day. "Good morning/afternoon/evening."
- b. You then identify the name of the company or organisation that you work for – i.e.: "S&K Chartered Accountants."
- c. Next you identify yourself. You mention your name and ask how you can be of assistance. "\_\_\_\_\_ speaking. How can I help you?"
- d. If you are not able to directly assist the caller, but someone else in your workplace can, then it is important to refer them. Before you refer them (i.e. transfer the telephone call) you should tell the caller the name and position of the person you are referring them to, and in what way they can be of service.
- e. In the event of being unable to deal with the callers needs yourself, and no one else is available, you must then take a message. This message should contain as much relevant information as possible about the caller, what their needs are and what action is required. Many organisations have printed message pads to make it as easy as possible to record this information. An entry may look like this:

<b>To:</b>		<b>Date:</b>	
		<b>Time:</b>	
<b>From:</b>			
<b>Name:</b>			
<b>Organisation:</b>			
<b>Telephone No:</b>			
<b>Message:</b>			
<b>Action:</b>			
<b>Please Call Back</b>		<b>Will ring you</b>	
<input type="checkbox"/>		<input type="checkbox"/>	

### **Making an Outgoing Call**

- On hearing the greeting of the person answering the phone, you need to identify yourself; this includes your name and the name of the company or organisation you work for.
- If you know whom you wish to speak to, ask for that person by name. If you do not know his/her name, ask by job title (i.e.: Purchasing Officer, Personnel Manager).
- If you do not know whom you actually need to speak to, ask the person answering the phone to direct you.
- When you have the nominated person on the phone and have introduced yourself specifically to this person, you must then outline the purpose of the call.

### **Voice**

The success of all phone calls depends largely on your voice. To ensure effective communication that leads to understanding, you must speak clearly. This includes using a pleasant tone, pronouncing your words clearly and speaking at a speed that can be easily understood.

### **Concentrate**

When making or receiving a phone call it is important that you concentrate on that particular activity. This will mean that you stop doing other things whilst talking on the phone.

### **Listening**

For effective communication to occur when using the telephone it is important that you use all of your listening skills. Careful listening and feedback are the only way to ensure that the intended message is understood.

### **Time**

When dealing with information over the telephone it is important to be efficient in your use of time. Clients do not like to spend longer than necessary on the telephone and tend to be particularly resentful when they have to wait too long for the phone to be answered or are placed on hold for anything but a brief period of time. To respect the demands of the time of your clients will require your responses to be both efficient and effective.

### Follow up steps are taken

The rest of a phone call will often require further action. If you have received the phone call you are responsible for the follow up action. This does not necessarily mean that you have to actually do the task; it may mean that you have to transfer the responsibility to the most appropriate person. Passing the message on as soon as possible is your responsibility.

### **Preparing to Make a Telephone Call**

If we are to spend our time well when we are using the telephone we must prepare. Such preparations make it easier to obtain all of the information intended and help us cope when things do not go as planned.

A sensible approach would be to write down a series of questions relating to the content of the telephone call on a piece of paper before you dial. As answers are obtained, you can tick off the questions. This simple method increases the likelihood of obtaining all desired information before hanging up.

Make sure you have the name of the person you wish to speak to. If you have to find this information out, write down this person's name and position as soon as received. Having a piece of paper handy when on the phone is also helpful; you will often need to jot down notes or key points as they arise. Do not rely on your memory.

Not all phone calls work to plan. You need to know what to do should the phone call not proceed as intended. For instance, an answering machine or a voice mail service may respond to your call. What message do you intend to leave? Many people make the mistake of leaving a good message but forget to leave a return phone number. This means that the person cannot respond to your message.

Concluding a telephone conversation is as important as the initial greeting. To make sure that you both understand the discussion you may have to repeat the key points. If action is required, you should be specific about who is to take what action and when. You may now politely say goodbye, thanking the person for their time and/or assistance

## 2.0 Communicate information in writing

### Introduction

Communicate information in writing is part of the Certificate of Site, Safety and Health Representative course and is designed to give you the skills and knowledge to be able to communicate effectively in the workplace.

Written communication is essential to make yourself understood during everyday working activities. Poor expression can lead to misunderstanding which at the very least will affect efficiency and may even cause a dangerous situation.

### Written Instructions

Special care must be taken when writing instructions, as you may not be available to explain what has been written, or to answer queries. Written instructions must be sufficiently clear so that the person reading them is able to immediately fully understand.

The writer should:

- Present instructions in a precise, logical format.
- Set instructions out in small, manageable steps.
- Leave space between each step so the reader can readily refer back.
- Use language that is familiar to the receiver.
- Avoid using technical jargon.
- Avoid using ambiguous terms (terms with more than one meaning) for example, 'fold half of the paper in half'.

Diagrams are especially important for written instructions. There is an old saying 'A picture tells a thousand words' and often a diagram can more clearly explain a complex idea. For example, it is simpler to use a diagram to show which button to push on a photocopier to alter the darkness, than to try and explain which button it is and where it is located on the machine.

Before beginning to give instructions a skilled communicator will consider the following points.

1. **Time and Place**  
Find a suitable time and place to present the instructions so the person will be able to concentrate without distractions.
2. **Small Steps**  
The instructor will have thought carefully about the task and broken it down into small, clear steps which follow logically one from the other.
3. **Check Prior Experience**  
The instructor will have found out some information about the person he/she will be instructing. It is important to know what previous experience the person has had in the area, as this will provide a starting point. Whether the person's first language is English and how easily they are able to understand language and terms used in the instructions would also need to be considered.
4. **Presenting the Instruction**  
Having clearly identified the information to be passed on and the person to receive the information the instructor would consider the most effective means of presenting it.
5. **Language**

The instructor would aim to use clear language and avoid using unnecessary jargon. He/she would ensure that any terms used were fully understood and always keep the background of the person they are speaking to in mind.

**6. Safety**

When presenting instructions it is essential to always consider the safety of the person who is to follow them. Before writing or giving instructions the instructor must think carefully about the task in order to identify any potential dangers. When presenting instructions safe work practices must be highlighted.

In your workplace you may find that there are times when instructions are given to you that are clear and simple to follow. At other times you may feel totally confused when asked to complete a task. Presenting clear instructions involves preparation and planning in order that the recipient is able to understand quickly and able to 'get on with the job' rather than guessing what may be meant and possibly misinterpreting the information.


## Writing memos

### Informal Memos

The memo (memorandum) is an abbreviated business letter. Of all the written documents that are used in companies, the memo is the most popular and useful. Memo means “a reminder”.

Generally, memos are used to pass short routine messages within an organisation. They are often written if the receiver of the message cannot be reached either personally or on the telephone. One practical consideration is that if the subject is complex, memo can be re-read by the receiver. If it is multi-copied, identical information can be made available simultaneously for everybody concerned.

Another important advantage of a memo is that it can be filed, either as hard copy, or electronically if the memo has been sent from one computer to another computer.

**Format:** A simple format for a memo is shown below. 

<b>MEMO</b>
<b>TO</b>
<b>FROM</b>
<b>DATE</b>
<b>SUBJECT</b>

There are two formats used by firms sending a memo:

**Basic format** is usually handwritten on printed memo forms.


**Formal format** is usually printed on a firm’s stationery specifically designed for this purpose. Formats are often stored on the computer for easy access. The company letterhead paper is never used for memos.

### **Special Points about Memos**

- Do not use a salutation such as “Dear Sir”/”Dear Ms West”, nor a complimentary close such as “yours faithfully”.
- Sign or initial the memo, depending on the policy of your organisation.
- Use full sentences, not abbreviated notes.
- Think of a few suitable words to use as your subject heading.

### Example of an Informal Memo

Your section is holding an end-of-year lunch in a local restaurant. This memo invites colleagues to attend the lunch. The cost will be \$10 for three courses.


	<b>MEMO</b>
<b>TO</b>	<i>All maintenance staff</i>
<b>FROM</b>	<i>Jim Beam [your name]</i>
<b>DATE</b>	<i>8 December 2001 [Note how dates are written]</i>
<b>SUBJECT</b>	<i>END-OF-YEAR LUNCH</i>
 <i>You are all invited to an end-of-year lunch. This will be held at the Miner's Right Restaurant, on Thursday 8 December at 12 noon.</i>	
 <i>The lunch will cost \$10 for three courses. Please let me know by 3 December if you are coming.</i>	
 <i>Jim Beam [your name or initials]</i>	

#### **Business Memos**

- State the purpose of the memo in a brief subject heading.
- Use full date style, eg, 28 November 2001
- Supply relevant information only
- Organise your points and your thoughts. Use the BIF approach – put the “Big Idea First” to save the reader the trouble of searching for it.
- Use sub Headings if the memo is long.
- Set out points you wish to make in a logical order, with a separate paragraph (or item) for each major point.
- Watch the tone of the memo. Memos should be polite and mainly personal.
- Proofread the memo. Check for inconsistencies in format.
- Keep a file copy.

### Example of a Business Memo

This memo has been prepared for Josh Garrard, Human Resource Manager.

 <b>MEMO</b>	
<b>TO</b>	Collette Burns
<b>FROM</b>	Josh Garrard Human Resources Manager
<b>DATE</b>	[Today's date]
<b>SUBJECT</b>	<b>COMPUTER AIDED LEARNING SEMINAR</b>
<p>The Computer Aided Learning Seminar will now be held on 13 December, commencing at 8.30 am.</p> <p>Please let all your staff know of the new date.</p> <p><i>Josh Garrard</i> [Josh Garrard's signature]</p>	

### **Business letters**

Business letters are part of our everyday living. We write them to seek information, to order goods, to pay bills etc. we receive them as answers to our enquiries as promotions for a new product or service, and so on.

Most letters are short – more than half of all letters written have fewer than one hundred words.

#### Layout

There are many ways you can set out your business letters and you will be introduced to variety of different methods in the workplace. However, **all layouts need to provide certain information to the reader.**

- Writer's name and address
- Date
- Name and address of the person or organisation receiving the letter
- Greeting or salutation
- Actual information – body of letter
- Complimentary close
- Signature of the sender, with printed name and job title.

In addition, some letters may also have a subject line, an attention line, reference initials and enclosure notation.



### **Business Letter Layout**

1	<b>LETTERHEAD</b>
2	28 November 2001
3	The Manager Johnson & Greene PO Box 82 BRISBANE QLD 4001  Dear Ms Johnson  Thank you for your letter and draft publicity material for your new products.  We are happy to enclose our design layout and costings. These may be amended if you are not completely satisfied with our quotation.  Please contact us as soon as you have made a decision.  Yours sincerely  P J Greer Director  Mr enc
4	

1. If the letter is a personal business letter, your address is placed at the top on the left-hand margin above the date. Do not put your name before the address. Your name will appear after your signature.
2. With open punctuation in this fully blocked letter, there are no punctuation marks at the end of the date, inside address, salutation or closing lines. Punctuation is used normally in the body of the letter.
3. When addressing a letter to a position within the organisation, use "The Manager", "Secretary" or "Director", etc.
4. When a manager, secretary or director signs a letter, type "Manager", "Secretary" or "Director" under the name. Do not prefix the title with "The".

## **THE LETTERHEAD**

The letterhead identifies the writer, address, telephone number and fax number.

### **The Date**

The date is placed after the letterhead. Dates should always be written in this form when using fully blocked letters with open punctuation.

20 February 2002

### **The Inside Address**

The inside address is the reader's address. It is placed below the date. Most businesses and government departments prefer letters to be addressed to a position rather than a person's name. This will stop a letter sitting in someone's 'In tray' while he/she is on holiday. Therefore, we usually write to 'The Manager', 'The Director', 'The Secretary', and so on.

To a box number:

The Manager  
Strategy Office Equipment  
PO Box 8  
TOOWONG QLD 4066

To a street address:

Mrs H Lucas  
8 Banambila Street  
ARANDA ACT 2614

### **Attention Line**

If we want to address a letter to a person by name in an organisation, you can use an attention line: that is, we address the letter to a position in the organisation or department. The attention line is placed above the salutation.

**Attention: Mr J Brown**

### **Salutation**

This is the greeting to the reader. If you know the reader's name, use it. If the first line of an inside address is a position, then the salutation should be "Dear Sir" or "Dear Madam" or "dear Sir/Madam" if the gender of the person is unknown.

### **Subject Line**

The subject line identifies the purpose of the letter. It is placed below the salutation.

### **The Close**

Current convention says to use "Yours faithfully" when the letter is addressed to a position (with the salutation "Dear Sir" or "Dear Madam") and "Yours sincerely" when the letter is addressed to a person by name. This applies to whether it is a first or a last name.

## Common pitfalls of business letter writing

### Too many big words

Keep your letter writing simple. Do not use words or jargon that the person you are writing to would not understand.

Not Suitable	Suitable	Not Suitable	Suitable
Acquaint	Tell	In conjunction with	With
Accomplish	Do	Initiate	Begin
Adjacent	Near/close	In lieu of	Instead of
Affirmative	Yes	In regard to	About
A number of	Some/many	In the event that	If
Ascertain	Learn	In the near future	Soon
Assistance	Help	Negative	No
Authentic	True	On the occasion of	When
Commence	Begin	Pertaining to	About
Demonstrate	Show	Place an order for	Order
Desire	Want	Presently	Now
Disclose	Show	Prior	Before
During the course of	During	Reveal	Show
Endeavour	Try	Spouse	Wife/husband/partner
En route	On the way	Subsequently	After
Ensure	Follow	Substantial	Large
Expedite	To do	Sufficient	Enough
Finalise	End	Terminate	End
Forfeit	Lose	Transpire	Happen
Forward by post	Mail		

### **Too many words**

Do not “pad” your letters. Try and be neutral. You would not say to someone “We acknowledge receipt of your letter”.

Instead you would say “Thank you for your letter”.

### **Vague Expressions**

Be concise and specific. Leave no doubt in your reader’s mind exactly what you mean.

#### **Sexist language**

Do not use a male term where it could mean either male or female. Instead, rewrite the sentence using a more generalised construction or a plural form.

Don’t use: “Businessmen are welcome to use our conference facilities”.

Instead, use: “Business men and women are welcome to use our conference facilities”.

Or “Business executives are welcome to use our conference facilities”

### **Passive Construction**

Use active verbs. The active voice makes the sentences shorter and stronger.

Don’t say: “The letter was forwarded by the manager yesterday”

Instead say: “The manager sent the letter yesterday”

Rewrite these examples of poor business writing:

1. Your letter of the 15<sup>th</sup> has been received. It is advised that payment of the remaining amount cannot be made until the claim form (XTO-3/4) has been received at this office.
2. I am in receipt of your communication of 18<sup>th</sup> instant, and it is very much regretted that the goods you ordered are no longer in stock.
3. Enclosed please find our catalogue and price lists.
4. We wish to place an order for steel capped safety boots in lieu of our usual order.
5. The chairman of the next meeting will be elected soon.
6. We beg to inform you that we are now in a position to supply high quality paint brushes at reasonable prices. If you are interested in ordering same, please favour us with a reply at your earliest convenience.

General guidelines for writing business letters.

- State what your letter is about in the first paragraph.
- Be specific
- Be clear and honest
- Keep your letter short
- Use active voice instead of passive
- Use correct punctuation
- Be courteous
- Proofread and make any necessary corrections
- Read your letter aloud when you have finished to see if it sounds natural

### Order Letters

When ordering goods a simple letter format can be used as shown below. The format would be on letterhead and should include:

- A statement requesting that an order is being placed.
- Set out details of the order by separating all necessary details:
  - ❑ Quantity
  - ❑ Type/number/make
  - ❑ Size/colour/style/shape
- State how the goods are to be delivered
- State your method of payment.

Dear Sir/Madam

Please send me by express courier this afternoon:

12 reams A4 Reflex white 80gsm copy paper  
6 fax pads A4 size  
2 cartons 100 metre fax rolls

The cost of these goods plus delivery should be added to our monthly account.

Yours faithfully

(Note that the close is 'faithfully' because of the salutation 'Dear Sir/Madam')

## Facsimiles

When you wish to send a letter, memo or other document in a hurry, it is very common to send it by fax. Facsimile communication (fax) sends an exact copy of any printed or written information from one fax machine to another through the telephone lines.

Before sending a document by fax, you should complete a facsimile header/cover sheet which gives details of the organisation and person to receive the fax, their fax number, number of pages being sent, your telephone number in case of transmission problems, and an area for a note to the receiver.

Here is an example of a facsimile cover sheet:

### FACSIMILE COVER SHEET

**To:**

**Organisation:**

**Phone:**

**Fax:**

**From:**

**Section:**

**Date:**

Pages including this cover page:

**Comments :**

## Telephone messages

Telephone messages may be taken from your work colleagues, a client or for many other reasons. A telephone message pad looks like the example below and may be single sheets or have a duplicate for proof of messages taken.

### TELEPHONE MESSAGE

RECEIVED BY \_\_\_\_\_

FOR \_\_\_\_\_

DATE \_\_\_\_\_ TIME \_\_\_\_\_

FROM \_\_\_\_\_ PHONE NO. \_\_\_\_\_

URGENT YES/NO

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### SIGNATURE

### *Documentation in the workplace*

All working environments require documentation of processes and activities. These form a vital reference point for the actual work being undertaken and the stages of its development.

Traditionally, written documentation has taken the form of record keeping and reporting. An individual completed it manually. The advent of technology has enabled more efficient documentation to occur in the office environment. It has also allowed this data to be recorded in soft copy (on a computer system) or as a hard copy (on paper). Most work environments deal with both, although we are rapidly heading towards the 'paper free office'.

### Company style manual

Many companies have preferred styles or formats for things like letters, fax header sheets, memos and telephone messages. This makes things easier for everyone to understand the information and also maintains a corporate style and feel. These forms may be distributed in pads for employees to use or they may be available on the company Intranet. Check out what forms your company has available and make sure you use the correct format.

## 3.0 Achieve meeting outcomes

### Introduction

Achieving meeting outcomes is part of the Certificate of Site, Safety and Health Representative course and is designed to give you the skills and knowledge to be able to participate in meetings and achieve relevant outcomes in the workplace.

Meetings are important forums where issues such as safety hazards, work arrangements, shift schedules, holiday rosters and a whole range of other issues can be discussed and decisions taken. Effective participation in a meeting is essential so that you can present your point of view and be heard by other people at the meeting. You should not expect to attend a meeting and come away having achieved all of your personal outcomes. Rather you should be prepared to listen to other points of view and maybe modify your position in the light of information that you may not have been aware of. In many cases the outcome of a meeting is a compromise that may not entirely satisfy everyone but is nevertheless an outcome that everyone can live with.

### What is a meeting?

A meeting is a gathering of two or more people with a common purpose (arrive at a decision, arrange a function, consider a course of action etc). It is also where the primary means of communication is by verbal or written means.

### Types of meeting

There are two basic types of meeting, one where information is given out and the other where the parties meet to solve a problem and make a decision. An information meeting would have one or more persons presenting the information and the other attendees listening and receiving the information. A decision making meeting is where all parties participate in a discussion and some form of consensus (agreement) is reached.

### Features of an effective decision making meeting

For any meeting to be effective it should have the following features.

1. A notice of the meeting time and place is sent in advance to all participants.
2. An agenda is provided to all participants that clearly shows the start and finish time as well as the items to be discussed.
3. A meeting leader is selected to keep the meeting on track. The meeting leader should be acceptable to all parties and is only there to keep the meeting to order and on schedule.
4. Someone is selected to take minutes of the meeting. These can be in short note form.
5. Meeting facilities provide adequate seating, lighting and other requirements for the meeting to be successful.
6. The meeting begins on time.
7. Each person attending the meeting is given the opportunity to express his/her opinion and contribute to the discussion and decision making.
8. Everyone listens to everyone else and considers his or her contribution.
9. As each agenda item is discussed and some action is determined the result of the discussion should be summarised and everyone at the meeting should agree or have the summary changed until agreement is reached.
10. Any action that is agreed upon should identify the person who is to undertake the action and when it is to be completed.
11. At the end of the meeting all summary points are repeated so that everyone is fully aware of agreed actions and who has to carry them out.
12. After the meeting a copy of the minutes are sent to each participant, those who were absent and any other interested party.

### Problems with meetings

Meetings can be very effective in getting agreement from a number of different people to solve a problem or agree to some method of addressing a problem. However, they can also be a complete waste of time. Be



prepared to address the following problems and take action to ensure that they do not interfere with meeting success.

Meeting problems	Solutions
Wandering off the subject and losing the point of the meeting	<ul style="list-style-type: none"> <li>• Prepare an agenda and stick to it</li> <li>• Meeting leader must bring the topic of discussion back to the agenda item</li> <li>• Keep summarising main points of agreement</li> <li>• Remind participants of the time and how far you have progressed</li> </ul>
Insufficient information presented to the meeting to make decisions (poor preparation)	<ul style="list-style-type: none"> <li>• Prepare information or ask participants to bring information to the meeting</li> <li>• Use visual aids (PowerPoint, OHT's) to help with the communication of information.</li> </ul>
Meeting was not effective (did not achieve anything)	<ul style="list-style-type: none"> <li>• Keep to the agenda</li> <li>• Do not allow one person to dominate the meeting, make sure everyone contributes</li> <li>• Keep discussion focussed while still allowing sufficient debate</li> <li>• Summarise main points and clearly identify those responsible for taking action</li> <li>• Follow up with a copy of the minutes showing what was agreed and who is to take action.</li> </ul>
Meeting was too long	<ul style="list-style-type: none"> <li>• Set a definite finishing time for the meeting</li> <li>• Keep to the agenda</li> <li>• Ask people to keep their contribution short and to the point</li> </ul>
Some people do not participate	<ul style="list-style-type: none"> <li>• Ask these people for their point of view</li> <li>• Identify specific people to address agenda items.</li> </ul>

## **Planning a meeting**

A lot of meetings occur in the same place, on the same day of the week or month and at the same time. They have nominated participants who represent various groups. For these meetings it is only the agenda items that have to be planned. There are also occasional meetings where it is necessary to consider many things such as who will meet, what they will discuss, where will they meet and when. This type of meeting requires considerably more planning.

### Purpose of a meeting

Start by deciding the purpose of the meeting. Why is the meeting necessary? This will help in drafting the agenda. A good way to do this is to contact all the participants of regular meetings and ask if there are any agenda items. For occasional meetings it is important to get agreement from all parties about the purpose of the meeting and the agenda items.

### Who will attend the meeting?

It would be nice to have the luxury of being able to select who attends a meeting. Then you could select those who are committed, have knowledge of the problems to be addressed, have the time to participate, have an open mind and be prepared to contribute. However, in most cases the participants will be nominated by a group with a stake in the discussion (union representative, management representative), be nominated because nobody else is interested or be a participant by default (staff member).

It is important to make sure that all those who have a vested interest in the subject of the meeting (stakeholders) are invited to attend. Excluding a vital player may end up in the meeting being a waste of time. However, on the other hand do not invite too many people since this can make the meeting difficult to keep on track. Keep the numbers attending the meeting to those who need to be there and no more.

### Meeting time

The meeting time can affect who will be able to attend. First select some meeting times when a suitable room and facilities are available. Then circulate the suggested times to the participants asking which are convenient. When you get the responses back you can select a meeting time that will suit the maximum number of participants.

### Meeting place

The normal place for a meeting is in a room that has a table and a few chairs. In some cases a conference room that has video and projection facilities may be required. However, there is an increasing use of technology that allows meetings to be held by teleconference, videoconference or on-line using Internet Chat. Technology mediated meetings require considerable technical expertise to set up and connect the various parties. If you decide to use one of these technology options then you will need technical help.

When choosing a meeting room you will need to make sure that it is big enough and has adequate facilities such as tables, chairs, projectors etc.

When you have decided where the meeting will take place make sure that you book the meeting room, teleconference or videoconference. There is nothing more embarrassing than to turn up for a meeting only to find that someone else is using the facilities because you did not book them.

Also a short time before the meeting go and set it up so that the tables and chairs are arranged as you want them. The lights and projection facilities all work, water is provided and any printed information is at hand.

## Conducting a meeting

The meeting leader is expected to control the meeting as follows.

- Introduce the participants to each other if they do not already know each other.
- Introduce each agenda item (sample agenda shown below).

<b>Meeting Agenda</b>	
<i>Agenda Item</i>	<i>Time</i>
Welcome and introductions	2 mins
Apologies	2 mins
Minutes of previous meeting	5 mins
Matters arising	15 mins
Item 1	10 mins
Item 2	10 mins
Item 3	10 mins
Summary of decisions taken and persons responsible for action to be taken	5 mins

Ensure that someone is taking minutes.

- Present or ask a third party to present any information that will help the discussion.
- Ask for comment from the participants.  
This should start a discussion about the agenda item and it is important to allow full discussion but still keep it pertinent and within a reasonable time. Meetings often get sidetracked on peripheral issues and it is up to the meeting leader to recognise this and bring the discussion back on track.
- Ask for a consensus about any decision or course of action that should be taken about the agenda item. If there is obvious disagreement it may be necessary to take a vote among those present.
- Summarise the decision or course of action that has been agreed upon so that everyone is clear about the decision or course of action.
- Clearly identify the person or group that will be responsible for implementing the action.
- Continue through the agenda items until they have all been satisfactorily addressed.
- At the end of the meeting summarise all decisions and who is responsible for taking action.
- Ensure that a copy of the minutes is sent to each participant.

## Taking minutes

It is very important to take accurate minutes of a meeting because without them you would not have a record of what was agreed and who was nominated to take action. A simple format is shown below. In some organisations there is a specific format for the taking of minutes and you should use your company format if one is available.

Date	21 <sup>st</sup> September 2008	
Present	Joe Bloggs Sarah Bloggs Fred Bloggs Tom Bloggs Denise Bloggs	
Apologies	Henry Bloggs Stephanie Bloggs	
Absent without apology	Tim Bloggs	
Meeting opened	3.15pm	
Minutes of previous meeting	Proposed as being accurate: Seconded:	
Business arising from previous meeting	Item	Action
Agenda items	Item	Action
Meeting closed	3.15pm	

## **Actions and decisions**

It is useful to identify the difference between actions and decisions. Actions are often the information collecting activities that are necessary before a decision can be taken. Members of the meeting or other staff may be asked to investigate a situation and report back to the meeting so that a decision can be made. This investigation and reporting process can often take some time before the meeting is satisfied that their decision is sound and based on the best available information.

### **Persons responsible for taking action (e.g. collecting information)**

In most cases the person responsible for taking action will be at the meeting. They will accept responsibility verbally and this can be recorded in the minutes. Then when the minutes are circulated everyone will know who is going to take action. However, in some cases the meeting may decide to ask a person who was not at the meeting to perform some action. In this case the person should be contacted in writing explaining exactly what is required and asking for a written response.

If it is not made clear who is responsible for taking action then vital information that is necessary to make a decision may not be presented to the next meeting.

## **Implementing decisions**

Any decision that is made at a meeting must be implemented in some way otherwise it is a waste of time making the decision. For example if a decision is taken to change a shift roster it will be necessary to communicate the decision to all who are affected. The meeting will have to decide how this should be done and one way would be to send a letter to all concerned. This may be better than just posting a notice on a notice board since not everyone reads notice boards!

As well as advising everyone concerned about the decision it is necessary to follow up to make sure the decision has been implemented correctly. For example if it is decided to erect a new sign advising that an area has now been designated as a confined space it will be necessary to make sure that the correct sign has been erected in an appropriate place.

## **Managing conflict**

Conflict comes from Latin - "striking together with force" - which implies disagreement, discord and friction among individuals<sup>2</sup>.

What we have to understand about conflict is that it is a natural part of human interaction. Every one of us has a point of view that may be similar to or very different from other people. When it is different from other people we naturally are in conflict with their point of view. The trick is not to get upset about a different point of view but to examine it and see if it has some merit. In doing so you might find that you have overlooked some aspect of the problem and need to revise your own position. In other words do not be pedantic or righteous about your own point of view. Have an open mind and enter into a discussion with the expectation that your ideas will be challenged.

## **Causes [sources] of conflict**

### Poor [misunderstood] Communication

"People don't get along because they fear each other. People fear each other because they don't know each other. They don't know each other because they have not properly communicated with each other" *Quote from Martin Luther King*

This is a common cause of conflict - it is the result of poor listening, little or no feedback, sending an ambiguous message, using inappropriate language or the existence of communication barriers.

### Individual Differences

As you are aware by now, each one of us have different:

- Values;
- Beliefs;
- Attitudes;
- Perceptions., and
- Personality - the 'personality clashes'.

Because we are all different, we need to respect these differences.

### Differences in individual goals, needs and expectations

### Power struggles between individuals

Power is the ability to make someone do something you want or to make something happen the way you want<sup>3</sup>. Power, like conflict, can be used destructively or constructively.

## 4.0. Make a presentation

### Introduction

Making a presentation is part of the Certificate of Site, Safety and Health Representative course and is designed to give you the skills and knowledge to be able to make a presentation to an audience in the workplace.

Making a presentation is all about communicating information. This may be for a wide variety of purposes including:

- Highlighting problems (such as using safety statistics to show areas of high risk).
- Explaining the implication of some new regulations (how they affect current practices).
- Tool box talks where a specific problem needs to be raised (incorrect parking of vehicles at the entrance to the workshop).
- Union meetings where enterprise bargaining details etc are decided.

There are so many different reasons why you may need to make a presentation and without basic skills you will not be able to get your message across.

### Identify the purpose of a presentation

First of all you will need to decide why you need to make a presentation in the first place. You may be asked to talk to a small group about some expertise that you have, you may be asked to represent your work team at a meeting with management or you may need to present information at a seminar. The purpose for the presentation will determine what you are trying to achieve and to whom you will need to present the information (the audience).

Knowing who the audience is will help you to decide what type of presentation you will make. If you are going to give a short talk at a tool box meeting it will probably be very informal and not need any visual aids. If you are going to give a presentation to management then it will be quite formal and probably require good visual aids.

Knowing the purpose of the presentation and the type of information to be communicated will help you to determine how to present the information. If you are communicating technical information you will need to make it very clear and unambiguous. If you are trying to persuade your audience around to your point of view then lots of examples, comparisons and statistics may be needed.

There are four basic reasons why you may need to give a presentation and each one will affect the way you make the presentation.

- **inform your audience**
- **instruct**
- **motivate**
- **sell**

Keep the purpose of the presentation in focus right through your preparation and delivery. Do not be tempted to deviate from the purpose or you will not achieve what you set out to do.

### Know your audience

To make your presentation effective and to ensure that you keep the attention of the people to whom you are speaking, it is important that you identify your audience.

Consider what they already know. What do they think about the issue? Are they likely to be hostile towards you? Are they interested or bored with this issue? All these things make a difference to the way you present your information.

Most of the time in the workplace you'll have a fairly mixed audience. In this case you will have to include information for different people in the audience. The best way to do this is to keep the information simple and clear.

The number of people who will be present helps you decide what equipment you will need and how many handouts you should photocopy. It also helps you prepare yourself.

Thinking about what your audience hopes to learn will help you give your presentation a focus. Remember, people pay more attention when you are saying things they want to hear.

It is also important to know how your audience feels about you and your subject. If they feel favourably towards you, it will be easier for you to keep them interested. But if they feel unfavourably or even hostile to you or your subject, you will have to make sure you have enough information to convince them of your point of view.

The level of knowledge your audience has will guide you in the amount of detailed explanation you will have to give.

Once you know what you are trying to achieve and who your audience is, you can start planning your presentation in a clear and logical way.

### **How do we plan a presentation?**

Planning a presentation begins with gathering and organising information.

#### **Information sources**

It can easily be seen that a very wide range of information may have to be sourced to be able to a presentation. Having identified the information that is needed the next step is to decide where it can be found.

You may be lucky and have immediate access to all of the information you need, in this case you do not need to search any further. However, in most cases you will need extra information and may even need specialist information. This is when you have to go out and start searching.

Fifty years ago the primary sources of information were books, magazines, and journals etc that were all in print format. This was supplemented by the radio. Then came television and suddenly graphic information was beamed into millions of households around the world. The present day sees us in the information age with Internet, Intranet, CDROM's, DVD's, and video, on-line access to library catalogues, databases and a whole lot more.

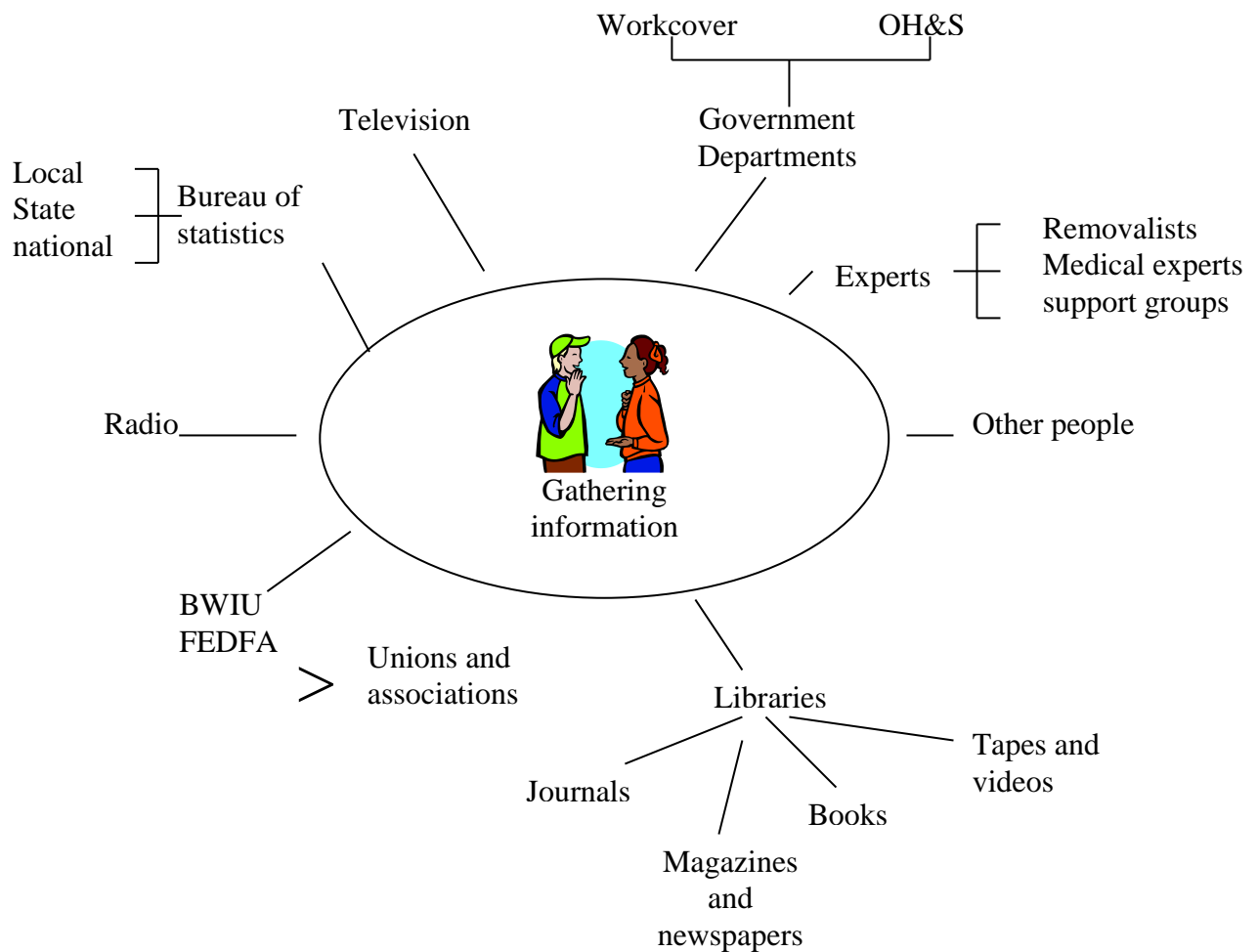
It seems that by identifying the information we needed to make a presentation we have created another problem of where to get the information from. This can be a very daunting task and unless you know where to look the 'getting of the information' can consume many hours of tedious searching.

When we look for information, there are some places we think of right away and some we hardly ever think of.

Interestingly, everyone has a different place or person they think of first. You may think of asking someone at work, your friend may think of government departments and someone else may go to the library. All these are fine, but the secret of good information gathering is to use as many places appropriate for the task.



Look at the mind map below and see how many of the places you would have thought of. Can you add any more specific to your organisation?



## Developing a plan of the presentation

The next step will be to plan the parts of the presentation. It will be necessary to sort the main points in order of importance, and determine what goes into an introduction and a conclusion. Both of these are important because the introduction gets people's interest and attention and the conclusion lets them know when the presentation has finished and leaves them with something to think about.

<b>Date</b>	<b>Planning for presentation to management</b>
3/12	<b>Gather facts and organise information</b>
7/12	<p><i>Prepare:</i></p> <ul style="list-style-type: none"> <li>• <i>Introduction – outline of main points</i></li> <li>• <i>Body – main points in order</i></li> <li>• <i>Conclusion – main points plus recommended action</i></li> </ul> <p><i>Decide what you will say</i></p> <p>Your dot points will remind you about the topic you want to talk about but you will still have to decide what you are going to say about each dot point.</p> <p><i>Organise handouts, visuals etc.</i></p> <p>You will have to decide if you want your audience to have a record of your presentation (handout), if you are going to use visual aids (overhead transparencies) or other methods to enhance your presentation.</p> <p><i>Practice in front of an audience and get feedback or videotape</i></p> <p>It is important to practice your presentation so that you can get it all to flow smoothly and also so that you can fit it all within any time limits.</p> <p><i>Practice in meeting room before meeting with management</i></p> <p>If possible have at least one practice in the room where you will be making the presentation. This allows you to check out the position of power points for any equipment and become familiar with things like whiteboards, lighting and the best place to deliver the presentation.</p>
7/12	
12/12	
12/12	
13/12	

### How do we present our views clearly and logically?

The best way to plan your presentation is to work through a series of questions. Here are two checklists (preparation and content) that you can use.

#### Checklist: Content

<ol style="list-style-type: none"><li>1. Is my topic and purpose clear in my own mind?</li><li>2. The central idea of my talk is: (write in one sentence)</li><li>3. Do I have all the information I need to give the talk and to answer any questions from the audience?</li><li>4. Is all the information relevant to my topic?</li><li>5. What visual aids do I have to support my talk?</li><li>6. At what point will I introduce my visual aids?</li><li>7. Will my visual aids be visible to everyone in the audience? If not, how will I make sure everyone sees them?</li></ol>	
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#### Checklist: Preparation

<ol style="list-style-type: none"><li>1. How long will I speak?</li><li>2. How am I going to start my talk – i.e. how can I break the ice?</li><li>3. My main points are:</li><li>4. Is this a logical sequence? Should I reorder them?</li><li>5. Will I have to change my language to:<ul style="list-style-type: none"><li>• Choose non technical words?</li><li>• Emphasise certain words?</li><li>• Repeat important words?</li></ul></li><li>6. What 'body language' should I be aware of?</li><li>7. How can I encourage people to ask questions?</li></ol>	
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## **Body language**

Body language refers to the way we communicate our feelings without using speech. It includes hand movements and sign language – as when a parent shakes a finger at a naughty child, or the supervisor stands with his hands on his hips. Body language includes all those little movements we make with our faces, our hands and even our whole bodies, movements that give other people clues about our thoughts and feelings.

Start observing others for the signals they are sending out when they speak to each other. Notice how they react to other people's signals.

When you are speaking in a meeting, watch the body language of your audience and interpret their reactions. Do they look bored or angry, or are they looking enthusiastic? Try to make eye contact with each person to help them concentrate on what you are saying.

When speakers fidget with their watches, their clothing or their hair, we know they are worried or nervous. These days' politicians practise their movements and hand gestures so that they look honest and believable when they speak on television or to large groups. You can practise giving the right signals to your audience too.

How do you know that you are sending the right messages? You might like to consider some of the following as you prepare your presentation.

### **Look at your audience**

It's difficult to listen to someone who seems to be talking to a point somewhere on the opposite wall. When you speak to a group, make eye contact with the audience frequently. It takes some practice, but it is definitely worth the effort to learn to let your eyes 'wander' around the room. The secret is to look at a particular person but to only make eye contact with them for a second or two and then look at someone else.

Don't be upset if there are some people who refuse to look at you. In some cultures it is considered rude to look people in the eye when you don't know them well.

### **Get rid of unwanted physical barriers**

If you don't need a desk or lectern to put notes on, stand to the side rather than behind it. Don't hide behind the overhead projector.

### **Keep your movements under control**

Besides exhausting yourself, you make the audience feel tense and tired if you wave your arms or walk about too much. Too much movement can distract your audience from the ideas you are trying to present.

### **Use visual aids for that professional touch**

Visual aids make the presentation easier to follow, and they give the audience a break. Keep them simple and easy to read.

### **Use notes only as a memory aid**

Reading from notes can make you sound as if you don't know your subject and can also make your voice sound boring.

Make cue cards--small cards which fit into the palm of your hand--with key points on them to help you remember what you are to talk about. If the cue cards list only the main points, they help you remember what you want to say. Your talk then becomes more natural and spontaneous.

### **Check your clothing**

Take your clothing into account when preparing your presentation, especially if you are not dressed in uniform. Your clothes tell the audience a lot about you, so think carefully before you dress for your talk.

Comfort is very important because you want to be able to stop thinking about yourself once you stand up to talk. But you also want your audience to pay attention to what you are saying, not what you look like. Don't wear clothes that call for attention. Very bright colours or fussy patterns, even on men's ties, make the audience look and think about them; so do lots of jewellery and unusual hairstyles.

When you have prepared your talk, practice it and try rating yourself using the checklist below. It would be ideal if you could record yourself on the video to do this. Otherwise, you could ask a friend or colleague to watch, or perform to the mirror.

Make comments for yourself beside each point.

<i>Features of speaking</i>	<i>Comments</i>
1. Do I smile?	<hr/>
2. Do I change my facial expression to give variety?	<hr/>
3. Do I use hand gestures to make points? Too much, too little or just right?	<hr/>
4. Do I read my speech or do I speak naturally?	<hr/>
5. Do I look at my feet or at a particular point too much?	<hr/>
6. Do I use my dot points smoothly?	<hr/>
7. Do my clothes present the best image?	<hr/>

## COMMENT ON ACTIVITY

A smile at the start helps suggest that you are relaxed and helps establish a relationship with the audience. No change in your facial expression--a deadpan expression--will result in a boring presentation.

Again, using your hands to point to something or to emphasise a point helps keep people's attention. On the other hand, constant hand gestures can be distracting. If you have a lively personality and wave your hands around a lot, it might be an idea to practise controlling some of your gestures.

When you read your speech or look at your feet you cannot make eye contact and engage with your audience. Use your cue cards just to jog your memory, but look at your audience as you speak.

Write only the main points on the cue card and don't have too many cards. Keep practising until you can use them smoothly.

Don't overdress but make sure your clothes suggest you consider this an occasion worth preparing for.

### A good voice

Do you have a good strong voice--one that will carry to the back of a large room? Perhaps your voice is a small, quiet one that people have to strain to hear. Or perhaps you have one of those high, shrill voices that can be heard right across the street.

Whatever kind of voice you have, if you are interested in improving it, you can. It's not easy but it certainly is possible.

First of all learn to talk with your whole face. Open your mouth and let the sounds come out. In fact, try to feel as if you are pushing them out. Practice in the mirror. At first you will feel as if you are making faces, but notice how clear your speech is. When your speech is clear, people can concentrate on what you have to say.

Let's list the important points for good speech:

- speak clearly
- speak loudly enough to be heard by everyone
- make sure your meaning is clear
- use a voice recorder to practise
- relax
- speak at an even rate – not too fast and not too slow
- breathe evenly – taking uneven breaths makes your voice uneven
- check your posture – stand up straight
- keep it simple – don't try to say too much

One more important point to think about is nerves. If you are very nervous--and everyone is the first time--try this:

Before you start speaking, take a deep breath, hold it for a count of three and then let it out very slowly but completely; then begin.

Letting your breath out slowly helps relax you so that you get rid of the tension that comes with being nervous.

Think about a previous trainer speaks and consider these questions.

Questions	
Does he/she keep their chin up? Where does he/she seem to be looking: <ul style="list-style-type: none"><li>• At you?</li><li>• Over your head?</li><li>• At their notes?</li></ul> Does he/she speak clearly or mumble? Does he/she speak slowly or fast? Does he/she hesitate or say 'ummm' often? Are there any features about his/her speech that catch your attention?	

Now apply these questions to some of the people you come in contact with at work and socially. By watching them, you will become more aware of your own habits.

#### *COMMENT ON ACTIVITY*

The main reason for thinking about how well or poorly other people speak is to help you improve your own voice production. By watching other people you can improve your performance in most things you do.

#### **How do we use different media?**

The word 'media' refers to the way people give information. The most common forms of media in our everyday lives are radio, television and newspapers.

In your presentation, the media you can use include:

- Handouts
- Whiteboards and flip charts
- Overhead projector transparencies
- Audio tapes and videos
- Slide projectors

Most of these are visual--that is, they show the audience something.

#### **Why use visual aids?**

Most people are not good listeners. They can't concentrate for long, they can't always pick out the main points and their minds wander. For this reason, visual aids can help keep their attention.

Visual aids also help you illustrate the points you want to make. For example, many people learn best when they see and hear something at the same time. Most people find it difficult to understand complex ideas when they hear them for the first time; in this case, a diagram can make the idea clearer. In addition, people switch off after a very short period of time-- and visual aids can bring their attention back to what you are saying.

Just a word of warning; don't try to use too many different visual aids in one presentation. This may distract your audience from your main points. Also, as part of your preparation, always check the equipment--that is, check the room layout, check the overhead projector and practise using it, and check that people at the back will have a clear view.

## **Main visual aids**

Here's a brief summary of some of the aids you can use:

- Handouts
- Boards and charts
- Overhead projectors
- Videos and audio tapes
- Slide projectors
- Computer presentation using PowerPoint

## **Handouts**

Handouts are photocopied sheets of written information or simple drawings, graphs or charts.

When using handouts, keep the information and the diagrams as simple as possible. Don't just hand them around and then ignore them. Refer to them in your talk. Encourage your audience to look at them, even make notes on them.

Never read these notes aloud to your audience. Summarise the main points; people can read the details later.

## **Boards and charts**

Black, green or white boards are also useful, but need a little more preparation and thought.

If the room is large, make sure your writing is large enough to be seen and read by people at the back of the room (go to the back and check for yourself, before the presentation).

Don't be tempted to keep talking while you are writing on the board. Also, make sure you step aside when you finish writing so that you are not blocking the view.

If you are using a board, make sure you have the correct writing tools and cleaner before you begin. Remember, a white board needs an erasable felt- tip pen (make sure it is not permanent), and use strong colours such as black or navy blue, that can be read easily.



### **Videos (DVD) and audio tapes**

If you feel your presentation would benefit from video (DVD) support, you could find a suitable video/DVD in the library (or wherever) when you get other information for your talk. You may need to show only a very brief extract of the video either to motivate interest or illustrate an important point. One thing to remember about using video material is that people tend to go to sleep if the video is more than a few minutes. Keep it short to make your point and to keep your audience alert.

Audio tapes are not often used in presentations. However, they can be useful when you want to demonstrate other people's opinions on an issue. If there are some people who are not able to attend your presentation you could use a videotape to make a permanent record and others could view the presentation at a later date. This can be more efficient than doing the same presentation several times.

### **Computer / Data presentation**

This type of presentation is becoming very popular now that computers are so widespread. The advantage of using a computer for your presentation is that you can include dot points, graphics, sound, video clips and special effects. However, the hardware (equipment) that is required is quite expensive and you also need to learn how to use software (computer programs) such as PowerPoint. This type of presentation is best left until you have learned the basic skills of planning, preparation, body language and delivery.

### **Questions**

You should always allow some time at the end or during your presentation for questions. This allows any misunderstanding to be clarified and further information to be provided. Even with the best presentation it is possible that someone in the audience has not fully understood your meaning. By asking for questions you will make sure that everyone understands the purpose and content of your presentation.

If you want people in the audience to ask questions during your presentation you might stop and ask 'has everyone understood what I have said so far? Then at the end of your presentation you might ask 'has anyone got any questions?

### **Final preparation**

By now you will understand that good preparation is the key to a successful presentation. If you want to make sure that all aspects of your talk run smoothly, you should also practice giving the talk.

Here are some final hints for a successful presentation:

- check where you place the overhead projector. Check that the video player works, and run the video forward to the scenes you plan to show.
- practice speaking fluently and naturally while using your dot points.
- time your talk, including the time it takes for the audience to take in the visuals.
- think about the questions people might ask, and prepare answers.
- make sure that you and the audience understand what the presentation is about.

After you have practised the presentation, and again after you have given it, evaluate how it went. Learn from your mistakes, using them to improve the next presentation.

Finally, you will often be asked to provide a written summary of your talk (perhaps for people who couldn't attend). Your dot points, visuals and plan will help you to write this summary.

## **Evaluating the presentation**

Evaluation simply means to check and see if the presentation achieved what it set out to do. If the presentation did not then there must have been something wrong with it and it needs to be changed. This means that the evaluation has to focus on the purpose of the presentation. You will remember that there were four reasons for giving a presentation:

- **inform your audience**
- **instruct**
- **motivate**
- **sell**

### **Inform your audience**

If the purpose of the presentation was to inform the audience then the question that an evaluation has to ask is 'did the audience get the necessary information? If they did then the presentation achieved its purpose. One way of doing this is to ask members of the audience a number of questions about the information contained in the presentation. If they answer correctly this would be an indication that the information was received.

Another method is to give out a short questionnaire. The advantage of a questionnaire is that everyone in the audience has to respond and a better picture of success can be obtained.

### **Instruct your audience**

If the purpose of the presentation was to instruct your audience then the question that an evaluation has to ask is 'has each person in the audience acquired new knowledge and/or skills? In this case a formal assessment has to be made of each person in the audience. A qualified trainer/assessor would be required to make this type of evaluation. In some situations a person with specialist knowledge might be asked to make a presentation to a group of students to assist in the delivery of a course. Then a trainer/assessor will administer a test to see if new knowledge or skills has been achieved.

### **Motivate your audience**

If the purpose of the presentation was to motivate your audience then the question that an evaluation has to ask is 'has the audience been motivated to adopt your message? Your message may have been to work more safely, to work better as a team, to solve conflicts by better communication etc. In this case you will probably have to monitor behaviour in the workplace to assess if your presentation achieved its purpose.

### **Sell to your audience**

The notion of selling does not necessarily mean that you get paid for a product you sell. It can mean selling an idea of a new way to do things, selling the agreements made in an enterprise bargaining agreement or selling the benefits of new technology. In many cases where you are 'selling' there will be a vote at the end of the presentation to decide if the new proposal is accepted. The proportion of the vote for and against will give you instant evaluation of how well you have achieved your purpose.

## SUMMARY

In this section, you have learnt how to give a presentation to a group. You have practised developing a clear plan that keeps your purpose and your audience in mind. You have also developed skills in presenting information in a clear and logical manner, using your voice and body language effectively. Finally, you have become aware of a variety of media, mostly visual aids, that can help make your talk more interesting.

In summary, effective presentation means:

- Knowing your purpose (whether to inform, to entertain, to persuade or to instruct).
- Knowing your audience (their education level, interest in your subject, age, occupation and political interests). Knowing what you are talking about (using your personal experience and knowledge).
- Knowing how to organise your presentation introduction, body and conclusion, using dot points).
- Practising your speech before final delivery (before a mirror, on a voice recorder, before friends/family).
- Knowing how to use visual aids when necessary, checking the room and equipment, and making sure everyone can see. Knowing how to use body language for full impact (establishing eye contact with everyone at least once; using gestures for emphasis/effect; standing upright or sitting straight to allow your voice to project, avoiding fiddling or playing with keys, coins, belts etc; dressing appropriately).

## 5.0. Participate in negotiations

### Introduction

There are many situations where you may need to enter into negotiation with another person or a group of people. This could be for social reasons (agreeing on a venue for a wedding) or at work (negotiating a pay rise in an enterprise bargaining situation). How you go about preparing for the negotiations and participating in them will determine your success in achieving your goals. This section will introduce you to negotiation, how you can plan and conduct negotiation as well as follow up with action after negotiation has been concluded.

### Negotiation skills

#### What is negotiation?

We enter into some form of negotiation every day but probably do not see it as negotiation. For example when you arrange to meet someone you might suggest a meeting in your office at 10 in the morning. The other person may say that is not convenient and suggest 11am as a more suitable time. The 'negotiation' continues until a mutually convenient time has been agreed. Using this example we can identify several features that are common to any negotiation.

- Negotiation is the process that is used to achieve agreement about the goals and the outcome of a situation. It is a communication process that we are involved with every day, at home, at work, socially, as we attempt to reach agreement with others.
- According to the dictionary - negotiation is a conference and bargaining for mutual agreement.
- A process where parties with conflicting aims establish the terms on which they will cooperate.
- Negotiation is usually something that takes place between two individuals or two groups - two sides our side and the other side.

#### The Four Styles of Negotiation

There are four basic styles of negotiation.

- Win/Lose
- Win/Win
- Lose/Win
- Lose/Lose

## **Win/Lose**

In this type of negotiation there is only one issue to be discussed and is where both parties have opposing positions. It often involves a pattern of rotating demands and concessions between parties. It is called win/lose because basically the objective of both parties is to succeed in having their own point of view accepted by the other party. In this case one party wins and the other loses.

### Features

The features of a win/lose strategy in a negotiation are:

- adopting a clear position and bargaining with others so that they yield or compromise with you
- dominate your opponent
- regard your opponent as an adversary
- start with tough, often unreasonable demands
- be inflexible
- demand major concession, while conceding little
- be evasive and withhold information intentionally, bluff
- make statements, rather than ask questions
- be coercive, use power to obtain compliance, threaten
- have solutions prepared from the start
- have little interest in opponent's needs
- seek win/lose outcome
- use of tactics

## **Win/Win**

This type of negotiation involves deciding issues on their merit rather than through a 'haggling' process. Mutual gains are emphasised and where interest's conflict, fair objective standards should be relied upon. This type of negotiation is hard on issues, but soft on people. In other words agreeing to compromise where necessary reduces the stress of negotiation. It is called win/win because both parties get positive outcomes.

### Features:

The features of a win/win strategy in negotiation are:

- aim to achieve a mutually acceptable outcome
- separate the people from the problem
- regard parties as collaborators rather than adversaries
- be flexible
- be willing to share information
- ask questions, rather than make statements
- seek solution from mutual problem solving
- be interested in the needs of the other party
- generate options for mutual gain
- use an objective criteria instead of haggling over an issue
- look for a win/win outcome

**Lose/Win**

This type of negotiation is where one party is submissive and is prepared to concede anything and everything. It means that one party enters the negotiation with the intention of allowing the other party to win.

**Lose/Lose**

This type of negotiation is where both parties are too rigid and are unable to collaborate. It means that there will never be any agreement since neither will make any concessions. In this situation it may be necessary to use a mediator or third party who can listen to both sides of the argument and make suggestions about a compromise solution.

## **The negotiation process**

There are definite steps that should be taken along the road of negotiation. If we follow these steps the chances of having success are greatly improved.

**NOTE: Negotiations involves two parties:**

- **Our side.**
- **The other side**

Therefore we need to always consider both sides in preparing the negotiation plan.

This is important when you consider the long term relationship between your side and the other side.

There are three steps to take during negotiation.

Part A: Planning the negotiations

Part B: Conducting the negotiations

Part C: Post negotiations – implementation

## **PART A: Planning the negotiations**

Planning the negotiation involves defining carefully what is to be negotiated, gathering information about the issues so that you can analyse the issues and then deciding on the goals you want to achieve in the negotiation process.

### **a) What is to be negotiated?**

Define the issue or problem to be negotiated.

This is a very important first step because if the other side has a different perception of what is to be negotiated then all of your preparation work will be for nothing. This may involve clarification with the other side. After discussion both parties should agree to a written description of the purpose of the negotiation.

Questions to ask are:

- Why are you entering this negotiation?
- Why is the other side entering this negotiation?
- What is the overall area of common purpose for both parties in this negotiation?
- What has happened between both parties in the past?
- What have you learnt from these previous interactions?

### **b) Gather information on the conflict/issue/problem.**

You need to:

- Focus on the issues of the problem and not on the people. Do not be distracted by personalities or personal differences on the other side, stick to the issues.
- Gather information about both your side and the other side - the more information - the better prepared you will be; and
- Distinguish between assumptions and facts. Assumptions such as we thought such and such was the case could easily be refuted. However, a fact such as we refer to the provisions in the agreement dated 10<sup>th</sup> December 2001 that state -----, cannot be denied.

Analyse issues into:

- Your issues [conditions as you see them]
- Opponent's issues [those that may be different from yours]
- Common issues [which affect both parties]
- Hidden issues [which you may not want to bring forward]
- Non-issues
- Categories that best suit your purpose; and
- If seeking cooperation, better to state issues as matters for discussion rather than demands.



**c) Define Negotiation Goals:**

It is important to be clear about what your goals are. You need to be sure that you know what you want to achieve out of the situation.

Defining your goal means making a statement about the best outcome that you can achieve in the situation. Your goal should:

- Focus on the outcomes you want to achieve
- Deal with the major issues of the situation
- Be achievable and clearly defined

Also define the goals of the other side as best you can. This will help you to understand any obstacles you may have in achieving your own goals.

**d) Negotiation outcomes**

If you decide upon the outcomes that you would like/intend/must achieve you will know what your best and worst outcomes are. One way of doing this is to use the LIM strategy.

<b>L [Like]</b>	<b>Identify the things you would like to achieve – the best outcome</b>
<b>I [Intend]</b>	<b>Identify the things you intend to achieve – the ‘shoulds’</b>
<b>M [Must]</b>	<b>Identify the things that you must achieve – your bottom line</b>

**Example:** Bob would ‘like’ to get a raise of \$40 per week as well as the use of a company car. However, he ‘intends’ to achieve a raise of \$30 per week and has decided that he will not accept anything less than \$20 per week. As far as Bob is concerned, this is a ‘must’.

**e) Determine options [concessions / tradable]**

**Concessions / tradable** are those things that you are prepared to trade away or concede or vary the terms of. e.g.: price, volume, payment terms, conditions of work, wages, period of agreement, etc

You will need to *prioritise* your concessions / tradable from your side and the other side's point of view. An example of how this may be done is shown in the table below. In the concessions / tradable column you would list those things that you are prepared to give ground. You will notice that your ideal outcome is the bottom line for the other side.

Our Side		The Other Side
<b>Ideal Outcome</b>	<b>Best Trading Limit</b>	<b>Bottom Line Outcome</b>
C		C            T
O            T		O            R
N            R		N            A
C            A		C            D
E            D	<b>BARGAINING</b>	E            E
S            or            A	<b>ZONE</b>	S            or            A
S            B		S            B
I            L		I            L
O            E		O            E
N            S		N            S
S		S
<b>Bottom Line Outcome</b>	<b>Worst Trading Limit</b>	<b>Ideal Outcome</b>

**f) Determine your BATNA**

In deciding to negotiate you need to develop your 'Best Alternative to a Negotiated Agreement' - BATNA.

How do you develop your BATNA?

1. List options available to you if you do not reach an agreement
2. Convert most promising ones into practical options
3. Determine what is involved in realising your short-list of alternatives
4. If you are able to do anything to put them into operation, do so. If not, reconsider the viability of your options
5. From the remaining options, select your single best one - this is your BATNA
6. Judge all proposals and offers against this BATNA. If the offers are better than your BATNA, take them. If they are worse, negotiate to improve them. If in deadlock, exercise your BATNA

**g) Determine your strategy**

Strategy refers to the overall plan by which you hope to run a negotiation. It involves a certain amount of prediction of the other side's behaviour.

***Determine style of negotiation***

- Select the collaborative, problem solving approach (win/win), however, bargaining (win/lose) may be required if the other side uses it.
- Avoid adopting a position - if you are adopting a Win/Win approach to negotiation it is not acceptable to defend your position with the argument 'that is what we want because that is what we want' - yet people who have a position of power use it. This approach will ensure a Win/Lose outcome - as it even denies the other party the opportunity to save face by appearing to accept a rational argument.
- Planning in sequence - It will be a miracle if both parties come to the negotiations with the same sequence.

### ***Select your people***

- Use individuals or teams
  - ☐ What factors will influence in whether to use an individual or teams?
  - ☐ In what situations would teams or individuals be more appropriate?
  - ☐ If you use teams, what is essential for them to be effective?

### ***Select your Communication Channel***

- You can choose between the following:
  - ☐ Meeting –formal
  - ☐ Meeting – informal
  - ☐ Use of third parties
  - ☐ Telephone
  - ☐ Written – letter/fax
  - ☐ Teleconferencing

### ***Select Time & Location of Negotiation***

- The timing of the negotiations can be crucial
- The location involves three choices:
  - Your place
  - The other side's place
  - A neutral place
- In deciding the location, you should also consider the physical environment of the location:
  - Does it allow for effective communications?
  - Does it meet the requirements of both parties?
  - Is there sufficient tables, chairs etc?
  - What setting is appropriate?

### ***Select appropriate Negotiation Conventions***

The negotiating conventions govern:

- The formality of proceedings and the way in which 'rules' are formulated to guide The negotiations
- Behaviour of the parties

Different conventions may apply to different:

- Industries
- Types of negotiation e.g. industrial relations
- Culture/nationality

h) Set agenda/written plan

Remember --this is to be used as a guide to assist your side. If you make it inflexible you will end up using the win/lose style of negotiation.

## **PART B: CONDUCTING THE NEGOTIATIONS**

Note: This will vary according to the context of the negotiations and most importantly - the style of negotiation being used by the other side.

### **Stages**

#### **a) Introduction/Discussion Stage**

At this stage both parties put forward the issues and their goals/proposals.

At this stage you should:

- Establish rapport
- Smiles and handshakes can be good ice breakers and signal your willingness to work collaboratively
- Emphasise the importance of the ongoing relationship
- Be clear about what is, and is not, going to be discussed. You need to talk with the other side to come to a joint definition of the problem and to agree on the boundaries of the discussion. This can take time as both sides probably differ in their views about what the problem/issue actually is. Time invested at this early stage establishing common definition of the problem will help misunderstandings at later stages
- Concentrate on the "Why's"
- Ask a lot of questions and summarise what is being said. As well as giving you greater control over what is happening this process will build trust, because it shows the other person you are giving them your attention.

#### **b) Persuasion Stage**

Persuasion is about being able to convince the other side to agree to what your needs/goals are. Your preparation in clarifying your goals is invaluable here.

To persuade someone to your point of view you need to:

- speak clearly and confidently
- be brief and to the point
- sound enthusiastic and committed to your proposal
- emphasise the strong points in your arguments while at the same time acknowledging any weaknesses
- show that you have thought about the issue from the other side's point of view
- present the information in terms of their needs, not just your wants
- respond to questions and/or criticisms calmly
- give the other side a chance to talk - listen to what they have to say

Remember the other side will be trying to persuade you so you will need to use assertive skills. Also it is a good technique to summarise where things stand and ask if that is a clear picture of how the other person sees the situation. Then you can suggest that you both take some time to think over what has been put forward. [E.g. a short break]

#### **c) Proposal Stage**

- At this stage of the negotiations, each side starts to make tentative proposals and looks at where they might be able to find common ground -offer alternative solutions.
- To negotiate well you need to have empathy for the other side and be able to make proposals that will be acceptable, while at the same time making sure that your not giving always something for nothing in return.
- Summarising and questioning what is being proposed is an important technique at this stage. It helps to clarify the proposal

**d) Generating a Win/Win Solution stage**

- This stage may involve making compromises to achieve a win/win outcome for both parties

**e) Agreement stage**

- At the closing stage of the negotiation, make sure you are clear about what has been agreed. It is important that both sides have the same agreement
- It is important to stop any inconsistencies by putting the agreement on paper

**PART C: POST - NEGOTIATIONS**

After the negotiations, both parties need to ensure all actions are implemented. What action needs to be taken will depend on the nature of the agreement. In many cases reaching an agreement may be the end of a negotiation but the beginning of a long period of implementation. Take the case of an enterprise bargaining agreement. The agreement may have several stages of pay increase that are dependent upon performance targets being met. In this case there will be a review at regular intervals and a continuous need to monitor the implementation of the agreement. This will need some planning to make sure the agreement is implemented effectively.

There may be legislative requirements (which there are for enterprise bargaining agreements) where the agreement has to be formally signed and lodged with the appropriate authority. This will require the use of official forms to document the agreement. There may also be company specific quality procedures that require the agreement to be reported in writing to a supervisor. You will need to be aware of any documenting or reporting requirements so that you can formally and correctly record the agreement.

After agreement has been reached you must follow up immediately by:

- Documenting the agreement.
- Reporting the agreement where required.
- Planning for the implementation of the agreement.

**Planning matrix**

The matrix below summarises the main steps of planning negotiations as well as post-negotiation. Use it to develop your own negotiation plan.

Planning the negotiations		
Considerations	Our side	Other side
Style of negotiation		
Purpose of negotiation		
Negotiation goals	1. _____ _____ 2. _____ _____ 3. _____ _____	1. _____ _____ 2. _____ _____ 3. _____ _____

BATNA (Best Alternative to Negotiated Agreement)		
Who will negotiate?		
Method of negotiation – meeting, telephone, letter.		
Time and location		
Negotiating conventions		

Post negotiation		
Considerations	Our side	Other side
Format for agreement (handshake, written and signed, legal document etc)		
Legal requirements		
Company requirements		
Implementation requirements		