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## **Improving Project Communications**

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Credit: 4 PDH

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## **COURSE LEARNING OUTCOMES**

This course teaches how to improve project communications by describing:

- The concept of viewing your daily work from a customer service perspective.
- The three possible outcomes “customers” may experience from encounters with them.
- How to identify “moments of truth” in your daily work life.
- How to analyze your daily interactions for potential opportunities for change.
- The choices of reaction you have when working under stress.
- The messages we send to our customers before we say a single word.
- How to deal effectively with angry customers and still retain good will.
- How to identify your individual working style.
- How to identify the working styles of others.
- How to deal effectively with working styles other than your own.

## COURSE OVERVIEW

Many people have probably not considered what it is like (in the eyes of others) to work with them. Like the famous cartoon character, Popeye, they think, “*I am what I am and that’s all that I am...*” and consider nothing more about it.



In reality, the *experience* of working with you can range from someone thinking, “*What a jerk!*” to “*Wow! What a nice person. I’m glad I met him (her)!*”

You may be asking yourself, “Why should I care what kind of an *experience* I create when working? I’m paid to work – not to *create an experience.*”

In today’s world, that may not be totally true. In fact, the more positive of an experience that you create when interacting with others may do wonders for your career or, at least, make your existing job create less wear-and-tear in your own life and maybe expand your career opportunities, too.

Although your job may not have the words “*customer service*” in the title, **anyone with whom you interact on the project is a customer.** Whether they pay for your services (such as in a profession) or your services are included in your salary (as part of a project team or member of the workforce), there is still the service provider (you) and the service customer (the person receiving your goods or services) relationship present. ***We can explain all of this much better if we take a customer service viewpoint. If you will take that perspective through this course, you will understand the message we are trying to convey and make it easy to work with you on the project.***

Let's begin.

This course is *not about customer service* because service is a 'given': it is the **LEAST PEOPLE EXPECT** when they deal with a service provider. Instead, it is about their *experience* during the *delivery of that service that is so critical and upon what this course is based*.



For example, if they go into a bank to make a deposit, the *least they expect* is for the teller to take their check or cash, deposit it to their account, and give them a receipt. The service that the bank is in business to provide is the *least the customer expects*. If the teller just does that, it is nothing special from the customer's perspective.

However, their *experience while in the bank during the transaction* is what matters because they will do one of three things:

- **Forget it** because everything about it was *expected and mundane* (ordinary, routine, or nothing special) and totally forgettable!
- **Remember it** because parts of it or everything about it was *unexpected and positive*
- **Remember it** because parts of it or everything about it was *unexpected and negative*

Do you think there is a connection between the amount of unexpected and positive (or negative) elements in an encounter and the extent to which it is considered positive or negative?

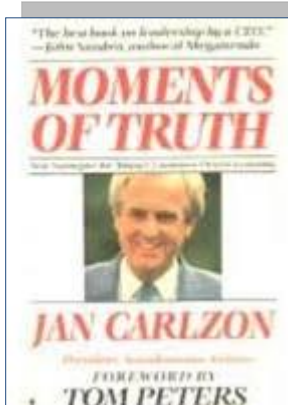
Why?

Do you think it takes an equal number of unexpected **positive or negative** elements to make an experience positive or negative?

Why?

(Just one negative aspect of an encounter can nullify all of the positive aspects in the minds of some people. Why take a chance?)

## MOMENTS OF TRUTH



In 1986 Jan Carlzon, the former president of Scandinavian Airlines, wrote a book, Moments of Truth. In his book, he defines the moment of truth in business as this:

*"Anytime a customer comes into contact with any aspect of a business, however remote, is an opportunity to form an impression."*

From this simple concept, he took an airline that was failing and turned it around to be one of the most respected airlines in the industry.

Some examples of moments of truth in his book about the airline business are:

- *When you call to make a reservation to take a flight, (Remember, this was written long before you could make your own online reservations)*
- *When you arrive at the airport and check your bags curbside,*
- *When you go inside and pick up your ticket at the ticket counter,*
- *When you are greeted at the gate,*
- *When you are taken care of by the flight attendants onboard the aircraft, and*
- *When you are greeted at your destination.*

These moments can be taken farther into categories we'll call:

- *Magic Moments* (something **unexpected AND POSITIVE** happens)
- *Miserable Moments* (something **unexpected AND NEGATIVE** happens)
- *Mundane Moments* (something **expected AND ORDINARY** happens)

Which ones do you think are remembered most (circle)? *Magic Miserable Mundane*

What will people usually do after having a *Magic* or *Miserable* experience?

### The Power of Pleasing People

- Consumers will spend up to 10% more for the same product with better service
- When people received good service, they will tell 9-12 other people about it.

- When people received poor service, they will tell up to 20 other people about it.
- There is an 82% chance customers will stay if their complaint is handled quickly and pleasantly.

What are some potential “moments of truth” in your daily project life from an **external** (someone from outside your project) customer’s perspectives and how do you think the customers would rate them?

Use symbols for the reaction as: **Magic = “+”** **Miserable = “x”** **Mundane = “?”**

	Description Of A “Moment Of Truth”	Typical Rating	Reason For That Rating
1			
2			
3			
4			

What are some potential “moments of truth” in your daily project life from an **internal** (someone from inside of your project) customer’s perspective and how do you think the customers would rate them?

Use symbols for the reaction as: **Magic = “+”** **Miserable = “x”** **Mundane = “?”**

	Description Of A “Moment Of Truth”	Typical Rating	Reason For That Rating
1			
2			
3			
4			



What are some potential “moments of truth” **WHEN DEALING WITH YOU** from an **external customer’s perspective** and how do you think the customers would rate them?

Use symbols for the reaction as: **Magic = “+”** **Miserable = “x”** **Mundane = “?”**

	Description Of A “Moment Of Truth”	Typical Rating	Reason For That Rating
1			
2			
3			
4			
5			

Is there room for improvement?

Why do you think so?

How would like the experience of dealing with you described?

What will you start doing **differently** (and when) to get “moments of truth” involving you closer to the level you want?

What are some potential “moments of truth” **WHEN DEALING WITH YOU** from an **internal customer’s perspective** and how do you think the customers would rate them?

Use symbols for the reaction as: **Magic = “+”** **Miserable = “x”** **Mundane = “?”**

Description Of A “Moment Of Truth”		Typical Rating	Reason For That Rating
1			
2			
3			
4			
5			

Is there room for improvement?

Why do you think so?

How would like the experience of dealing with you described?

What will you start doing **differently** (and when) to get “moments of truth” involving you closer to the level you want?

## ONCE AGAIN... THE BASICS

The basic elements of getting people to like working with you include:

- ✓ Developing a “customer” friendly attitude
- ✓ Expanding your definition of service
- ✓ Reconsidering who your “customers” are



We will take a few minutes to refresh these.

## DEVELOPING A CUSTOMER FRIENDLY ATTITUDE

- I. Think about one of the functions that define your job on the project. (For example, if you are a project engineer, you probably review blueprints, supervise people, meet with vendors, submit project documents, etc.)

List some of the steps involved with that function. If it involves interaction with another human being (**internal or external**), identify that person by name (if known) and position or title.

(For example, if meeting with a vendor, the meeting would be scheduled and held, business conducted, action items identified, follow-up issues identified, and possibly the next meeting scheduled.)

The project job function I am describing is: \_\_\_\_\_

Steps	What I Do At This Step	I Interact With... (Name & Job Function)	How I Interact (Call, email, fax, etc.)
1			
2			
3			
4			
5			
6			
7			
8			

II. Look at the steps above where you interacted with someone and analyze that interaction. Pick any five steps and analyze the typical interaction a little deeper.

Step	How I Interact (Call, email, fax)	What Do You Typically Say or Do During This Interaction?	How Would You Describe Your Relationship With That Person? Why?

Is there room for improvement in your relationship with those people you mentioned above?

What is in it for you to improve it?

What could you do to improve it?

What would you expect as a result of working to improve it?

When would you start doing that?

How can you “establish a relationship” with a customer when you are facing a deadline, short-staffed, over worked, underappreciated, etc?

You can still choose to be polite, smile, and pleasant because they DID NOT CREATE THE PRESSURE on you. Your reaction to the environment is always your choice – no one else controls it.



## EXPANDING YOUR DEFINITION OF SERVICE

Ask yourself these questions:

- Do you consider giving the customer exactly what he/she asks for (circle one) *adequate, good, or very good* customer service?<sup>1</sup> Why?
- What can you give them in addition to exactly what they asked for that could take your answer (above) up a little higher?<sup>2</sup>

## RECONSIDERING WHO YOUR PROJECT CUSTOMERS ARE

**External Project Customers:** Who all do you include in the phrase “*external project customers?*”

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<sup>1</sup> Giving them *exactly* what they ask for is an “adequate” experience at best. Think of getting the new license tags for your car and your trip to the Department of Motor Vehicles. You get what you expect – the new tags – but how would you typically rate the *experience?*

<sup>2</sup> A conscious effort on your part to give them a memorable experience can go a long way to improving your typical work day. Try it – what do you have to lose?

Who else could reasonably be included in this group? Why?

What have you done recently that indicates you are aware of these external customers?

What could you start doing differently regarding this group? Why?

**Internal Project Customers:** Who all do you include in the phrase “*internal project customers?*”

Who else could reasonably be included in this group? Why?

What have you done recently that indicates you are aware of these internal customers?

What could you start doing differently regarding this group? Why?

### FIRST IMPRESSIONS

We say so much more with our body language than we do with our spoken language.

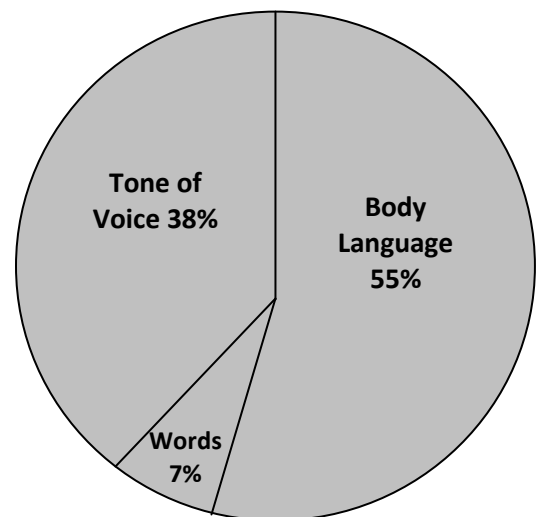
How can you tell when someone with whom you work isn't really happy to see you even when they do not say anything?

How do you act when you see someone you are not happy to see?

How can you tell when someone on the telephone isn't really happy that you called even when you cannot see them?

Which of those clues (above) do you probably display when you are not ready to deliver a “magic moment” of customer experience?

When you display them, how does that impact your value to the project and your employer?



Why should you consider your impact on the customer and your value to the company?

## VISUAL MESSAGES



How does “staring” differ from “looking at?”

Would you rather have a coworker stare at you or look at you?

Keep that preference in mind when you deal with your customers.

When a customer is upset, what should you consider about eye contact?<sup>3</sup>

Your body posture and behavior can tell the customer so much about your interest in them. What messages do behaviors like these send to the customer?

- ✓ Leaning back or stepping away
- ✓ Turning your body away from the customer
- ✓ Looking past them at the clock or someone behind them
- ✓ Checking the vibrating cell phone to see who is calling



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<sup>3</sup> Be careful with eye contact when a customer is upset because strong eye contact is, for many people, a challenge requiring a response. This is not the time to get them more agitated. Also, allow them to vent a little while telling them what you CAN do instead of what you cannot do which is probably what set them off to begin with.)

- ✓ Looking at their watches repeatedly
- ✓ Always a big sigh before answering the question
- ✓ Clicking a ball point pen open and closed while they talk to you
- ✓ Virtually no body movement, no facial reaction, and staring straight ahead

What do **you** do to convey you really aren't interested in listening to someone?



### My Space and Your Space

*“Personal space”* is the distance that feels comfortable between you and another person. If someone moves too closely into ours, we tend to back away.

How can you tell if you are invading a customer's space?

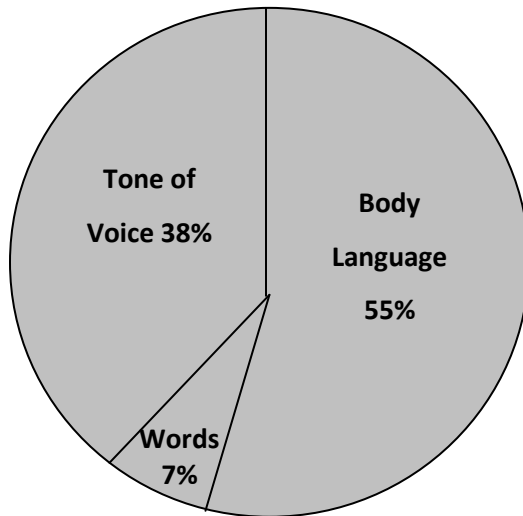
How can someone tell if they are invading your space?

## PHONE TONE & OTHER BEHAVIOR

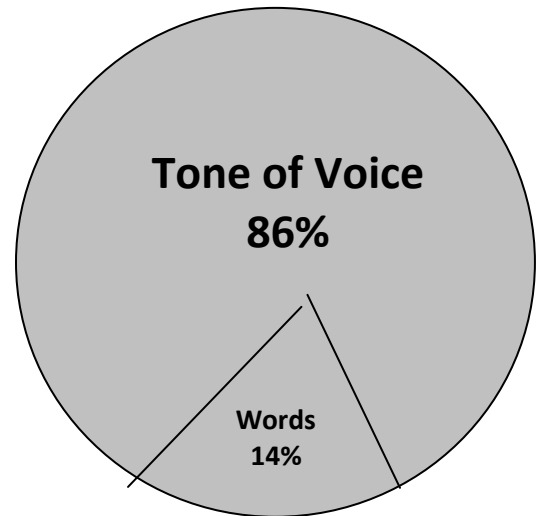
Earlier we talked about the importance of body language when we can see the customers but how do things change when we talk to them on the telephone?



FACE-TO-FACE



OVER THE TELEPHONE



Read these statements and put emphasis on these underlined words:

1. “**Thank you for calling** (your company, your department, however you normally answer the telephone). **This is (your name). How may I help you?**” (What does that sound like?)
2. “**Thank you for calling** (your company, your department, however you normally answer the telephone). **This is (your name). How may I help you?**” (What does that sound like?)
3. “**Thank you for calling** (your company, your department, however you normally answer the telephone). **This is (your name). How may I help you?**” (What does that sound like?)
4. “**Thank you for calling** (your company, your department, however you normally answer the telephone). **This is (your name). How may I help you?**” (What does that sound like?)
5. “**Thank you for calling** (your company, your department, however you normally answer the telephone). **This is (your name). How may I help you?**” (What does that sound like?)



## DEALING WITH ANGRY CUSTOMERS

How do you handle calls when the caller is angry, difficult, or has a complaint? Here are some things to keep in mind for now. We will get into more detail later.



- **Empathize** (“*I can see how that would be frustrating.*”) You are not agreeing with them – just demonstrating you are listening.
- **Apologize** (“*I am sorry you had this problem.*”) Remember agreement DOES NOT mean you admit guilt. It’s just agreeing this is a frustrating situation.
- **Stay positive** (They’re angry at the problem, not you!)
- **Take responsibility** for finding a solution
- **Confirm your understanding** (“*Let me make sure I understand this correctly...*”)

Then you can:

1. Don’t overreact to “trigger words” or phrases (Such as, “*Doesn’t anyone there know what they’re doing?*”)
2. Listen completely to the complaint
3. **DO NOT BLAME ANYONE!** (Not you, the caller, the company, or the department even if you know who did it)
4. Paraphrase their comments and ask questions to make sure you understand the situation (this also demonstrates to them you were paying attention.)
5. Offer solutions and alternatives (if possible) Alternatives gives the caller a sense of power and calms them. Why?<sup>4</sup>

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<sup>4</sup> They feel powerless when they do not get what they were expecting. If you can provide options as we do on page 38, it gives them a feeling of being back in control (to some extent) again.

6. Confirm the solution with the caller and make sure they agree on what has been decided.

### “3 STRIKES AND YOU ARE OUT” RULE

- **Strike 1** = Ask the caller not to use derogatory language or voice tone (*“It will be easier for me to work on your problem if you’ll stop distracting me by calling us INCOMPETENT”*)
- **Strike 2** = If they continue, please ask them to find other words or a more conversational tone so you can work on their problem.
- **Strike 3** = Apologize that their words and/or tone prevents you from helping them and suggest they call back when they are less emotional: **then hang up.**
- Contact your supervisor immediately about the caller and give them as much documentation as you can (**including specific quotes because you want them to relive as much of the event as possible so they can feel the same indignation you did!**)



## DON'T HELP THEM GET ANGRIER

Although some customers may be angry when you first meet them, there are words or phrases we can avoid so we do not help them become angrier. Here are some words and phrases that are could cause problems with suggestions of alternatives.

Avoid These	Try These	
You have to...	Will you...	
You can't or you must...	I (our company) can...	
It's not our policy...	Because (reason), we cannot...	
I'll try...	I'll do it or I'll see how much I can do	
What's your problem?	What difficulty are you having?	
Not my job.	I'll find out who does that.	
(transfer without warning)	May I transfer you to....	
<b>More Alternatives to Try With Customers</b>		
Which do you prefer?	Here are some options.	Are you willing?
What have you considered?	I made a mistake.	What would work best for you?
How can I correct it for you?	I apologize for (...)	

## PLACING THE CALLER (INTERNAL OR EXTERNAL) ON “HOLD”



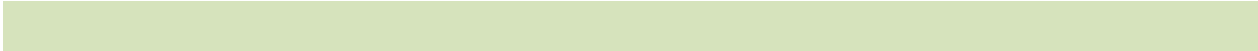
- Ask permission first (*“May I put you on hold for a moment while I check?”*)
  - Don’t keep them there for more that 1 minute
  - If it will take longer, tell them and ask if you can call them back or if they will continue to hold.
- 
- Give progress reports every 30-45 seconds
  - Thank them for holding each time you get back with them

## ENDING THE CALL EFFECTIVELY

Even if you have done an excellent job so far in the call dealing with the customer’s concerns, you must still end it effectively to make sure you have done all you can.

Make sure you do all of these:

- ✓ Repeat any action steps you will take and make sure the customer agrees with you.
- ✓ Ask if there is anything else you can do. This gives the customer a chance to mention anything else on their mind.
- ✓ Thank them for calling and bringing this to your attention (if it was a problem).
- ✓ **LET THE CALLER HANG UP FIRST SO YOU DO NOT ACCIDENTLY CUT THEM OFF IN THE MIDDLE OF A SENTENCE.**
- ✓ Write down any important information as soon as you get off the phone.



## RELATING TO YOUR PROJECT CUSTOMERS

You probably have many project customers with whom you get along very well because they seem to be a lot like you! Maybe it is the way they present their problem or the way they respond to your answers that makes you think you have a lot in common.

Additionally, there are probably many with whom you feel absolutely no connection and it is difficult to deal with them successfully. The reason may be that your individual *working style* –the way you interact with the world – is similar to some of your customers’ working styles and very different from some others.

Before we can help you deal effectively with the various customers you have, it is important that you know what your working style is so you can identify theirs. Once you are able to understand the clues and characteristics of the four major working styles, it will become easier for you to become flexible in your approach to customers who display a different style than yours.

## SELF-ASSESSMENT SURVEY

We all are *combinations of the four various working styles* and, depending on the situation, we may display different aspects of our individual style.

For example, at work we may allow the “take charge” aspect of our personality to lead while after work, with friends, we may pull back the take-charge element and bring out the “friendly and feelings” aspect of us. Please remember this – we are a blend of these styles and the one that we call upon most is our working style.



Select the response in the following questions, which is most likely how you would respond. ***The answers are neither right nor wrong and there is no “best answer”.*** Just base your responses on how you are today, not how you think you need to be or want to be in the future.

**1. When talking to a customer or co-worker....**

- a. I maintain eye contact the whole time.
- b. I alternate between looking at the person and looking down.
- c. I look around the room a good deal of the time.
- d. I try to maintain eye contact but look away from time to time.

**2. If I have an important decision to make....**

- a. I think it through completely before deciding.
- b. I go with my gut instincts.
- c. I consider the impact it will have on other people before deciding.
- d. I run it by someone whose opinion I respect before deciding.

**3. My office or work area mostly has....**

- a. Family photos and sentimental items displayed.
- b. Inspirational posters, awards, and art displayed.
- c. Graphs and charts displayed.
- d. Calendars and project outlines displayed.

**4. If I am having a conflict with a co-worker or customer....**

- a. I try to help the situation along by focusing on the positive.
- b. I stay calm and try to understand the cause of the conflict.
- c. I try to avoid discussing the issue causing the conflict.

- d. I confront it right away so that it can get resolved as soon as possible.

**5. When I talk on the phone at work....**

- a. I keep the conversation focused on the purpose of the call.
- b. I spend a few minutes chatting before getting down to business.
- c. I am in no hurry to get off the phone and don't mind chatting about personal things, the weather, and so on.
- d. I try to keep the conversation as brief as possible.

**6. If a co-worker is upset....**

- a. I ask if I can do anything to help.
- b. I leave him alone because I don't want to intrude on his privacy.
- c. I try to cheer him up and help him to see the bright side.
- d. I feel uncomfortable and hope he gets over it soon.

**7. When I attend meetings at work....**

- a. I sit back and think about what is being said before offering my opinion.
- b. I put all my cards on the table so my opinion is well known.
- c. I express my opinion enthusiastically, but listen to other's ideas as well.
- d. I try to support the ideas of the other people in the meeting.

**8. When I make a presentation in front of a group....**

- a. I am entertaining and often humorous.
- b. I am clear and concise.
- c. I speak relatively quietly.
- d. I am direct, specific, and sometimes loud.

**9. When a customer is explaining a problem to me....**



- a. I try to understand and empathize with how she is feeling.
- b. I look for the specific facts pertaining to the situation.
- c. I listen carefully for the main issue so that I can find a solution.
- d. I use my body language and tone of voice to show her that I understand.

**10. When I attend training programs or presentations....**

- a. I get bored if the person moves too slowly.
- b. I try to be supportive of the speaker, knowing how hard the job is.
- c. I want it to be entertaining and informative.
- d. I look for the logic behind what the speaker is saying.

**11. When I want to get my point across to customers or co-workers....**

- a. I listen to their point of view first and then express my ideas gently.
- b. I strongly state my opinion so that they know where I stand.
- c. I try to persuade them without being too forceful.
- d. I explain the thinking and logic behind what I am saying.

**12. When I am late for a meeting or appointment....**

- a. I don't panic, and I call ahead to say that I'll be a few minutes late.
- b. I feel bad about keeping the other person waiting.
- c. I get very upset and rush to get there as soon as possible.
- d. I apologize profusely after I arrive.

**13. I set goals and objectives at work that....**

- a. I think I can realistically attain.
- b. I feel are challenging and would be exciting to achieve.
- c. I need to achieve as part of a bigger objective.

- d. Will make me feel good when I achieve them.

**14. When explaining a problem to a co-worker whom I need help from....**

- a. I explain the problem in as much detail as possible.
- b. I sometimes exaggerate to make my point.
- c. I try to explain how the problem makes me feel.
- d. I explain how I would like the problem to be solved.

**15. If customers or co-workers are late for a meeting with me in my office....**

- a. I keep myself busy by making phone calls or working until they arrive.
- b. I assume they were delayed a bit and don't get upset.
- c. I call to make sure that I have the correct information (date, time, and so on).
- d. I get upset that the person is wasting my time.

**16. When I am behind on a project and feel pressure to get it done....**

- a. I make a list of everything I need to do, in what order, by when.
- b. I block out everything else and focus 100 percent on the work I need to do.
- c. I become anxious and have a hard time focusing on my work.
- d. I set a date to get the project done by and go for it.

**17. When I feel verbally attacked by a customer or a co-worker....**

- a. I tell her to stop it.
- b. I feel hurt but usually don't say anything about it to her.
- c. I ignore her anger and try to focus on the facts of the situation.
- d. I let her know in strong terms that I don't like her behavior.

**18. When I see a co-worker or customer whom I like and haven't seen recently....**

- a. I give him a friendly hug.

- b. I greet him but don't shake his hand.
- c. I give him a firm but quick handshake.
- d. I give him an enthusiastic handshake that lasts a few moments.

1 a Driver b Amiable c Analytical d Expressive	4 a Expressive b Amiable c Analytical d Driver	7 a Analytical b Driver c Expressive d Amiable	10 a Driver b Amiable c Expressive d Analytical	13 a Analytical b Expressive c Driver d Amiable	16 a Analytical b Driver c Amiable d Expressive
2 a Analytical b Driver c Amiable d Expressive	5 a Driver b Expressive c Amiable d Analytical	8 a Expressive b Analytical c Amiable d Driver	11 a Amiable b Driver c Expressive d Analytical	14 a Analytical b Expressive c Amiable d Driver	17 a Driver b Amiable c Analytical d Expressive
3 a Amiable b Expressive c Analytical d Driver	6 a Amiable b Analytical c Expressive d Driver	9 a Amiable b Analytical c Driver d Expressive	12 a Analytical b Amiable c Driver d Expressive	15 a Expressive b Amiable c Analytical d Driver	18 a Amiable b Analytical c Driver d Expressive

Write your score for each of the four types here:

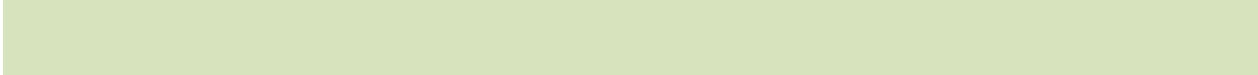
**Driver = \_\_\_\_\_ Amiable = \_\_\_\_\_ Analytical = \_\_\_\_\_ Expressive = \_\_\_\_\_**

Working styles from *Personal Styles and Effective Performance: Make Your Style*

*Work for You* by David Merrill and Roger Reid (Chilton, 1981)

Since there are four distinct Working Styles, and each of us is a mixture in different proportions of them, the odds are very low that you'll encounter someone just like you. It is obviously very wise to understand something about the rest of the world if you want them to get to like working with you.

It is also important to remember that no one is purely one working style – we are mixtures of all of them. However, one of these four styles will emerge as the dominant one – that is the one we are talking about.



## DEMONSTRATING OUR WORKING STYLE

Our everyday behaviors can go a long way to identifying our style. If you are observant, you can pick up clues from:

**What people say** - **How they say it**  
**How they act** - **Their work environment**

**What People Say:** How do you express yourself? Do you use colorful phrases, “down home-isms”, or larger-than-life expressions, or do you tend to say things in a more modest, low-key manner? The types of words you use and the way you use them is a direct reflection of your working style.

**How they Say It:** Do you speak quickly in your normal mode and speed up even more when you get angry? Or do you speak slowly and distinctly and grow quieter if you get angry? Does your voice have a lot of inflections and tonal changes or does it stay essentially the same regardless of the topic? Is there excitement in your voice or more calm and relaxed? The way you speak tells people as much about you as how you say it.



**How they Act:** Have people ever said to you, “If we hold your hands, you won’t be able to talk!” Do you gesture broadly when you speak or do they rest quietly in your lap or at your side while you speak? Do people have to move quickly to keep up with you or do you stroll at a leisurely pace? Your body movements are a very natural aspect of your working style.



**Their work environment:** Do you have reports, files, and papers strewn over your desk or is it neat and tidy? Are your pictures of your family casual or formally posed? What about the wall decorations? Are they achievement oriented (#1 in the golf tournament) or (attention seeking) “here’s the governor and I at a luncheon?” The office environment can tell a lot about the inhabitant to an alert observer.

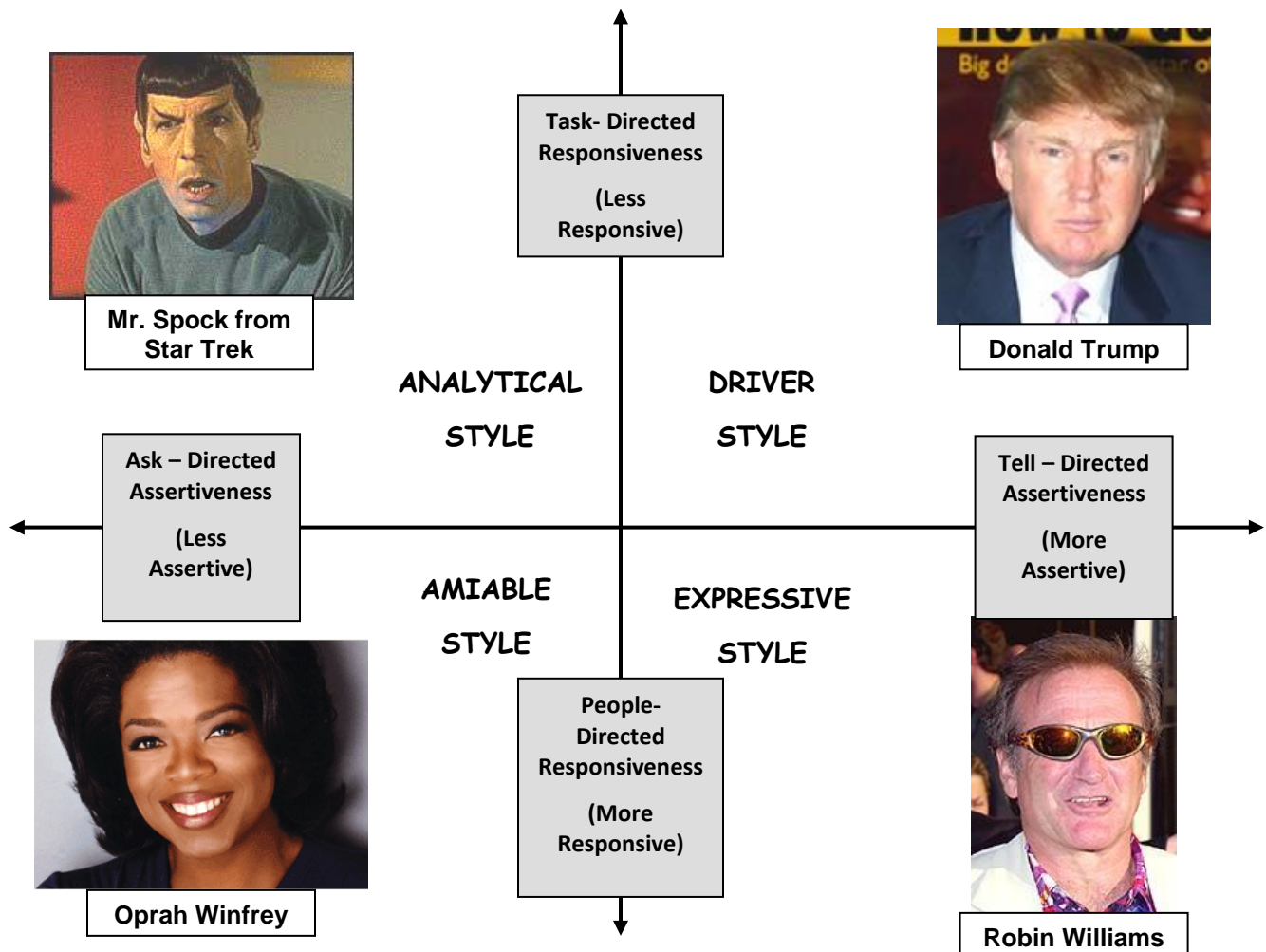


## THE WORKING STYLES GRID

The concept of Working Styles is based on where people fall along two behavioral ranges. These ranges address:

- How (or the extent to which) people **assert** themselves to others (outgoing communication meaning whether they typically “tell” or “ask”) and,
- How (or the extent to which) they **respond** to others with focus more on people or task issues.

Here is a grid to help visualize it and these are famous people who exemplify these traits:



## THE ANALYTICAL STYLE



Although a fictional person, Mr. Spock of (Original) Star Trek fame is the classic example of an analytical (even to an extreme).  
(Or Sheldon Cooper for “Big Bang Theory” TV fans.)



Their working style has a low degree of assertiveness as they listen more than they speak (in reality, not TV) and a low degree of emotional expression. People with this style *focus on facts more than feelings*. They evaluate situations objectively and gather plenty of data before making a decision. They prefer an organized work environment where they know exactly what is expected of them.

They are often perceived as deliberate, constrained, and logical. They tend to be good listeners who follow procedures, carefully weigh all alternatives, and remain steadfast in purpose. They are seen as disciplined, independent, and unaggressive, and as people who are likely to let others take the social initiative. They may be perceived as conservative, businesslike, and persistent in their relationships with others. Strongly risk-averse and pursue their goals only after they have compiled plenty of data to support a project's purpose, practicality, and policy. For them, the *process* is as important as the outcome.

Here are some of the phrases often used to describe **Analyticals**:

- Seem technically oriented, often seeking structure, certainty, and evidence before making decisions (show them the warranty!)
- Appear quiet and unassuming; may show little emotion when dealing with others (they are listening much more closely than it appears)
- Tend to take little social initiative with others; may remain guarded until a strong relationship has been developed

- May push to extend existing ideas and procedures before going on to something new
- Will meticulously check every word and term in a contract or agreement before signing it

**Their office environment probably includes:**

- Minimal wall decorations. If there are some, they are probably off-the-shelf graphics, nothing frivolous, everything is utilitarian
- If there are documents on their desk, they are neatly stacked and everything looks orderly
- Family pictures, if any, are formal portrait settings, not candid shots of vacation, the dog, etc.
- There are probably charts, graphs, or other statistical measurements in their office.

**Strengths of this style include:**

- Seem able to approach problems on the basis of facts and logic and to create solid solutions
- Tend to make the most practical decision by being thorough and open to ideas
- Like to discover new ways of solving old problems
- Often productively competent in working out a problem and in getting a job done right

**Self-development opportunities for this style include:**

- Realize that their need to collect data it makes it difficult to meet a deadline
- Their need to have zero errors makes it difficult to provide an estimate or make an off-the-cuff suggestion
- Their need for orderliness makes it uncomfortable when someone with whom they are working jumps from one topic to another randomly

**Strategies for dealing with them**

- Meet their need for data by providing charts, graphs, warranties, or statistics. Always check your data first because they will.



- Give them some room for error when asking for an estimate or opinion otherwise you will never get an answer because they are still collecting data. For example, ask for an estimate “with a 95% confidence level.” If you give them an ‘out’ (95% instead of 100%) so they do not have to be perfect, you allow them to reduce their inner drive for error avoidance.
- Set some preliminary milestones so you can check on progress instead of an all-or-nothing final date. Their drive for perfection and analysis of data may cause them to get so bogged down in the details they lose track of the overall schedule.
- Support their principles and thinking; provide evidence and service; and answers that explain HOW as often as possible.
- When explaining something, proceed in a logical sequence and do not make any leaps of logic.

## THE AMIABLE STYLE

Oprah Winfrey has been called, “America’s Beloved Best Friend” on the Academy of Achievement’s website. Although very successful as a business woman, she has built her fortune on being perceived as a caring and friendly person.



She, as an amiable, is often seen as quiet, unassuming, and supportive. Perceived as a warm, friendly listener who seem easy to get along with, she attracts people who enjoy personal contact and shared responsibility (“teamwork” is something they enjoy.). They tend to pursue goals by first establishing strong personal ties (first the personal relationship then the business relationship.) They may be perceived as avoiding risks and decision making unless they have strong support or data to back them up.

They like time to build relationships and to seek support and feedback from others before they make decisions (“Where do you want to go to lunch? What about you?” they will ask everyone in the group but make no decision themselves for fear of offending someone.) They are very cooperative in their interaction with others because they want to be liked and “fit in’.

Phrases frequently used by people to describe amiables like Oprah include:

- Seem to accept others, placing a high priority on getting along
- Appear quiet, cooperative, and supportive as they seek approval
- Seem easy to get to know and work with
- Tend to minimize interpersonal conflict whenever possible

**Their office environment probably includes:**

- “Happy” decorations including candid pictures of family & friends
- “Have a Nice Day” slogan variations
- Probably some clutter giving it a comfortable and homey feel
- Some emphasis on teamwork in an award, a slogan, or books on the shelf dealing with relationships and or communication

**Strengths of this style include:**

- May help others and provide positive strokes for other people's work and accomplishments
- May have a deep sense of loyalty and dedication to those in their work and peer groups
- Seem able to communicate trust and confidence in other people
- Function very well on teams and other social settings
- Tend to make people feel comfortable about themselves

**Self-development opportunities for this style include**

- Amiables often have trouble asserting themselves and making decisions quickly.
- Generally, they don't like confronting disagreement with co-workers
- Must resist the temptation to base everything on feelings and more on results.
- Their reluctance to deal with conflict means that they don't always get what they really want.
- Their frustration about not resolving such issues can turn into resentment that is directed toward the same co-worker in later interactions.

**Strategies for dealing with them**

- Use a friendly tone of voice while making frequent eye contact and smiling
- They seek approval – provide it as much as you can.
- Use no aggressive or no dramatic gestures because this may be seen as unfriendly

- Speak slowly and in soft tones with moderate inflection (because that's how friends talk with each other)
- Use language that is supportive and encouraging with guarantees and assurances

## THE DRIVER STYLE



Donald Trump is a billionaire real estate developer that has amassed a fortune through owning key New York properties (i.e. Trump Towers), and Atlantic City casinos. He has gained fame for his flamboyant deals, his runs for President, and his supermodel love interests.

He is the consummate Driver because he is results-oriented, tending to initiate action and give clear direction. Drivers seek control over their environment and want to know the estimated outcome of each option when making deals. They are willing to accept risks, but want to move quickly and have the final say. They love competition – especially when they win. In relationships, they may appear uncommunicative, independent and competitive and tend to focus on efficiency or productivity rather than devoting time and attention to casual relationships. They seldom see a need to share personal motives or feelings.

Drivers feel most comfortable pursuing their goals when they're in charge and taking the initiative. They are often seen as thriving in situations in which they can create plans and have others carry them out.

Drivers are frequently described as:

- Heartless, bottom-line oriented, will make direct eye contact as a way to intimidate to exert influence
- Able to move quickly and briskly with purpose while others hurry to catch up
- Speaking forcefully and fast-paced using terms such as will (not should), can (not try), and sounding very certain of themselves
- They seem to make things happen, take risks, and view problems as just another challenge.

**Their office environment probably includes:**

- Planning calendars and project outlines displayed in their offices
- Wall decorations include achievement awards (“#1 in the golf tournament)
- Furniture is “executive” style and of the best available (or best they can afford)
- Probably many communication methods available because they want to stay in touch, solve problems, and keep moving people ahead toward goals.

**Strengths of this style include:**

- The ability to take charge of situations and make quick decisions are what often make drivers high achievers.
- They put a single-minded focus on the goals they want and are not afraid to take risks to accomplish them.
- Often confident and strong-willed and like to initiate, control, and serve as own motivator
- Appear efficient, hardworking, results-oriented, and direct and to the point

**Growth opportunities for this style include:**

- When feeling stressed, drivers can be so focused on getting things done quickly that they can overlook details and make mistakes.
- They may push aside their own and other's feelings to get the job done, which can create tense situations with co-workers.
- Because of their hard-driving, competitive nature, drivers can sometimes become workaholics.
- Their failure to consider the feelings of others can drive off a lot of good employees from their organization

**Strategies for dealing with them:**

- Don't waste their time – get to the point and be efficient
- Allow them to build their own structure when possible

- Give them choices between options and probabilities – allows them to be ‘in charge’
- They measure value by results – show them how your product achieves results

## THE EXPRESSIVE STYLE

If the description of an Expressive is *“often excitable, fun-loving, and talkative; loves an audience and applause or recognition may be a cherished reward”*, then Robin Williams is the perfect example.



Expressives are motivated by recognition, approval and prestige. They are very communicative and approachable, while freely sharing their feelings and thoughts.

They move quickly, continually excited about the next big idea, but they often don't commit to specific plans or see things through to completion. They are better with strategy than the tactics needed for execution. Like drivers, they enjoy taking risks. When making decisions, they tend to place more stock in the opinions of prominent or successful people than in logic or research. Though they consider relationships important, the Expressive's competitive nature leads them to seek quieter friends who are supportive of their dreams and ideas, often making relationships shallow or short-lived.

Phrases like these are often heard when describing Expressives:

- Appear to be risk-takers, competitive, and spirited
- Often futuristic, creative, and inspirational
- They are out-going, spontaneous, persuasive, gregarious, and humorous
- They see the “big picture” but don't care much for the details
- Their approach toward projects may be, “Ready, FIRE, aim!”
- They think quickly and are more solution than process (like analyticals are) focused



**Their office environment probably includes:**

- Pictures that shout “look at me” such as with celebrities, unique locations (The Golden Gate Bridge), or exciting events such as skydiving. (The Driver’s pictures would should competition or achievement like #1 in the golf tournament. The Expressive’s would be ‘*Here are the Governor and I playing golf*’.)
- Bright colors
- Candid pictures of the family and their dog
- Many different projects or topics that they are working on

**Strengths of this style include:**

- Their lively nature allows them to motivate and generate excitement in others.
- They work at a fast pace and are good at building alliances and relationships to accomplish their goals.
- They are well suited for high-profile positions that require them to make public presentations, such as trainers, actors, salespeople, and so on.
- Like to share dreams and may stimulate creative exchange of ideas

**Growth opportunities for this style include:**

- When upset, they can often communicate their feelings with considerable intensity, and if criticized, they may lash out with a verbal attack.
- They may seem overwhelming to less assertive styles, because when they're enthusiastic about an idea, they press for a decision and may overlook important details.
- They may need to stay with a project longer than just the initial start-up phase to make sure everyone understands the concept
- Rely less on intuition at times and dig for more facts

**Strategies for working with them:**

- Start by focusing on generalities rather than on details.

- They usually respond well to playful people who focus on the big picture.
- It's important to make direct eye contact, having energetic and fast-paced speech,
- Be sure to allow time in the meeting for socializing, talking about experiences, people, and opinions, in addition to the facts
- Ask about their intuitive sense of things will help
- Support your ideas with testimonials from people whom they know and like
- Paraphrase any agreements made and maintain a balance between fun and reaching objectives



If you had a large project, the four styles would broadly work like this:

- The *expressive dreamer* designs it and lays it all out
- The *take-charge driver* leads it and makes it happen
- The *amiable team builder* keeps the workforce together
- The *analytical data manager* maintains the records and documents

## BACKUP STYLE

Many people, when under stress, usually revert to their “backup style” of behavior. For example, back on page 30, you learned that people fall into two broad categories of assertiveness: more or less assertive. The more assertive types are the **Drivers** and **Expressives**; the less assertive one are the **Amiables** and **Analyticals**.

Under stress, people will become more of whichever assertive styles they are.

- The **Drivers** become more demanding (their controlling trait);
- **Expressives** attack verbally (their verbal and quick thinking abilities);
- **Amiables** give in and put their personal feelings aside because maintaining the relationship is important;
- **Analyticals** withdraw into a shell avoiding the situation.

How is knowing this useful for making it easier for people to work with you?

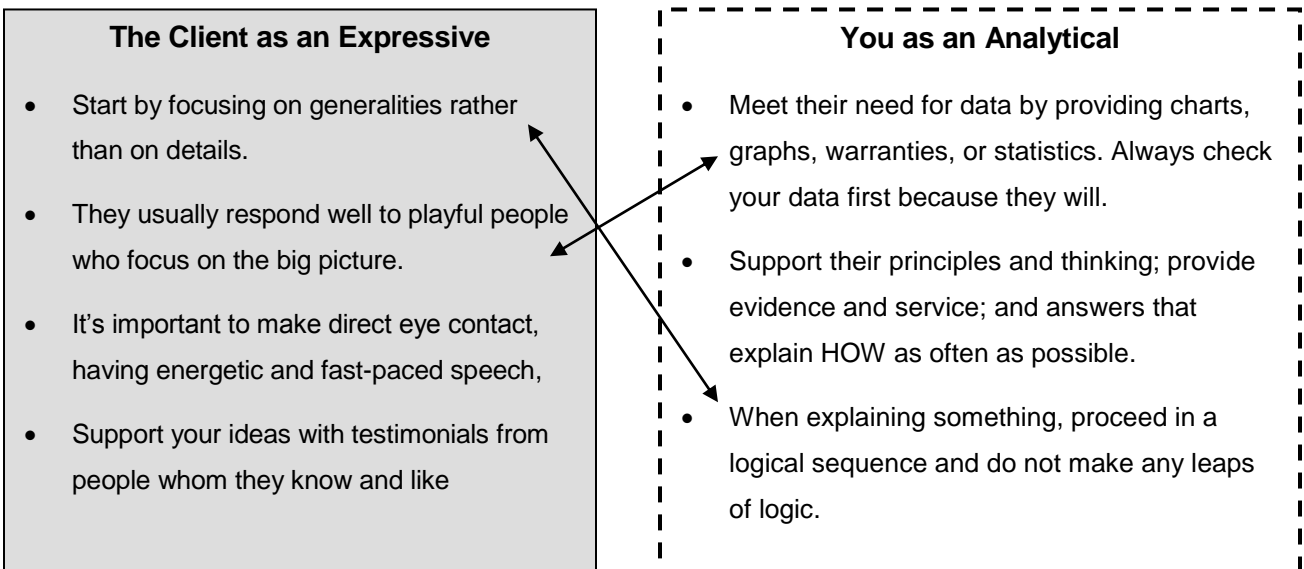
## WORKING STYLE FLEXIBILITY

Earlier, we indicated that four distinct styles means that there will be very few just like us (we do not include ethnic, religious, geographic, etc. factors but rather the basic working style as we have used in this course) and nearly everyone is different to some extent.



This means if we can find a way to approach the other person *in a way most like their working style*, we increase the odds we can communicate effectively depending on our skills. *The greater our attempt to see the world through their eyes will make them like to work more with us.*

Suppose you were an **Analytical** (Mr. Spock) having to deal with an **Expressive** (Robin Williams). From our guidelines on dealing with the various working styles, here are some of the strategies to use when working with them.



Can you see what a disaster it would be to use the **Analytical** approach of providing a lot of data and statistics first when an **Expressive** just wants generalities? Or when the Expressive just wants the “big picture” and the Analytical insists on the logical sequence without making any leaps of logic?

Flexibility means that “you temporarily adapt so you can be successful in the encounter”; *it does not mean becoming the other style.*



The most successful fishermen look at the world *from the perspective of the fish.*

They ask, “*What kind of water conditions, visibility, temperature, depth, and light is best?*”

*What about time of day? Which is best, incoming, outgoing, slack, or flood tide? What is their favorite bait?”*

**The more they can “think like the fish”, the more they will catch.**



Think of someone with whom you work on the project and identify their working style.

- What clues do you notice?
- Based on those clues, what is their probable working style?
- How should you approach them?
- What is your working style?
- What potential conflicts are there between your style and theirs?
- What will you do to avoid these conflicts?

## HOW TO SAY “NO” AND PRESERVE GOOD WILL

Sometimes, it is impossible to say, “Yes” to our customers.

How many of these typical reasons do you find in your project work that makes it impossible to say “Yes!”?

What are examples of them?

- **Federal Regulations**

*An example in my work is:*

- **The law**

*An example in my work is:*

- **Company policies and procedures**

*An example in my work is:*

- **Out of stock**

*An example in my work is:*

- **Expired date (it’s too late)**

*An example in my work is:*

- **Just Not Possible** (physical impossibility such as a dieter demanded to lose 15 pounds before their wedding in 6 days; demanding a hairstyle that requires 3 inches more of hair than you currently have; learn to speak a language in a week before leaving on vacation .)

*An example in my work is:*

In these situations, the best response is to say something like, “I’m sorry but because of (the reason), I cannot do as you ask.” **Always try to give the reason you are saying no before you actually say no.** (It may soften the impact on them a little.)



Try not to become angry if they say it's a stupid policy, you should have ordered more, etc. because they ARE NOT NECESSARILY UPSET WITH YOU – they are unhappy with the situation. Once again, try not to LET IT BECOME PERSONAL.

### AVOIDING A “HARD NO”

Although it may be tempting at times to say to a customer, “What part of NO don't you understand”, keep in mind that ***nothing good will ever come from that response.***



See if the situation allows you to devise an “optional no” instead. This does not mean you give them the option of yes or no because the answer to their question is still “NO!” But what you add with the “no” is a choice of alternatives that deflects their attention from what they can't have to what they can have (with a little adjustment on their part.)

For example, a restaurant could give a customer one of these responses:

- ✓ “We do not have a table for 4 available at 8:00 PM “(and say nothing more.)
- ✓ “We do not have a table for 4 available at 8:00 PM *but we do have one available at 7:30 or 8:30.* If you can adjust your schedule a little earlier or a little later, we can seat you.” **Telling the customer how the solution is in their hands takes the impact off of you.**

Another alternative could be:

- ✓ “We do not have a table for 4 available at 8:00 PM “(and say nothing more.)
- ✓ “We do not have a table for 4 available at 8:00 PM but I could shove two tables for 2 together if you wouldn't mind the improvisation.”

**Once again, telling the customer how the solution is in their hands takes the impact off of you.**

What are typical “HARD NO” responses that can come up in your work?

What are some options you could offer to get the customer's attention off the HARD NO and on to the choices they may have to still get almost what they want?

## SATISFIED CUSTOMERS NEED MORE THAN THEY EXPECTED

Think about the last time you went to the Department of Motor Vehicles to renew your auto tags or to renew your driver's license. Did you get what you expected to get? (This year's tag or your new license) Would you say you were satisfied meaning *did you get what you expected to get?*

How would you rate the experience of going there on a scale of 10 = great to 1 = terrible? \_\_\_\_

Did you know why people call 13 rolls a "baker's dozen?" Have you ever heard the word "**lagniappe** (lan 'yap)?" *Lagniappe* derives from New World Spanish *la ñapa*, "the gift."

It came into the rich Creole dialect mixture of New Orleans and there acquired a French spelling. It is still used in the Gulf States, especially southern Louisiana, to denote a little bonus that a friendly shopkeeper might add to a purchase.

Such as buying a dozen rolls and having an extra one tossed in as a way of saying "thank you" to the customer. By extension, it may mean "an extra or unexpected gift or benefit."

What kind of "extra or unexpected gift or benefit" can you give to your customers? (Remember, it does not always have to be tangible – it can be a smile, a "thank you", a sincere "have a nice day" depending on your working style.)



## BOUNCING BACK FROM PROJECT BLUNDERS

Eventually something in your work life will go wrong. That is one of the few guarantees in life in addition to death and taxes. Regardless of how extensively you have planned and prepared, something will inevitably go wrong.



What can you do?

- ✓ You can spend a lot of energy becoming upset, sharing your misery with those around you (including the customer), and generally show everyone (including you) how ill-equipped you are to deal with the unexpected or,
- ✓ You can view it as an *emotional-growth opportunity* and invest that same energy into solving the problem, preserving the customer relationship, and recovering afterwards.

Problems typically fall into 2 categories:

- ⇒ **Predictable** This could have happened such as a restaurant running out of the day's 'special' (Prepare for this by asking, "*What will we do if this predictable thing happens?*")
- ⇒ **Unpredictable** A car hits the power pole on the corner and all the lights in the restaurant go out. (Since you can't plan for these, the service provider who stays calm and looks for solutions instead of focusing on the problem will probably retain the most good will from the customers.)

Remember, a problem can (and does) happen to anyone but not just anyone can turn it into a positive outcome.

A strong career development opportunity is waiting there for those who can turn it around positively.



When did you see a customer service person or coworker turn a problem into a positive outcome?  
When have you ever done that?

## SPECIFIC STEPS TO TAKE

These three simple steps will help you bounce back from most blunders. Give them a try!

### 1. Apologize

Few actions diffuse an emotional situation faster than simply saying (sincerely), “I am sorry.” Remember, this is not an admission of guilt but a means of empathizing with the customer.



### 2. Fix the problem

If you can't fix it totally, do as much as you can or give them options that you can do. Look back on page 46 for some ideas.

### 3. Give them some lagniappe

Try to find some evidence that you care with some lagniappe (page 47) or “care tokens” as you try to fix their problem. These are typical ‘care tokens.’

- Restaurants may offer a free dessert if they didn't cook your steak correctly
- A garage may provide a loaner car if they can't get yours repaired today.
- An airline may give you some beverage coupons if your flight is delayed for reasons controlled by the airline (maintenance, baggage problems, etc.)

What can you give as lagniappe to your disappointed customers?