The Sales Manager's
Guidebook

Module 2
Leading & Motivating
Your Sales Team

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The Sales Manager's Guidebook – Module 2

Welcome to Module 2 of The Sales Manager's Guidebook. In this module we will look at developing leadership skills, motivating team members, setting standards of performance, managing team discipline, teambuilding and running more effective team meetings.

This resource can be used by Sales Managers to develop their own skills as well as Trainers wishing to produce training sessions around the material contained in this module.

The module contains information on each topic as well as checklists, exercises and team activities.

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DEVELOPING LEADERSHIP SKILLS

If we are going to become more effective team leaders we need a model of leadership against which to measure our current skill levels and plan ways to improve this aspect of our management role.

In his book .Developing Leaders., John Adair, a recognised expert in the field of leadership studies, uses a basic model for leadership skills. In it he says that leadership is a function of:

- **The team**
- **The task**
- **The individual**

This says that effective leadership is possible only if the leader pays attention to:
. achieving the task;
. through teamwork;
. while recognising the needs of individual team members.
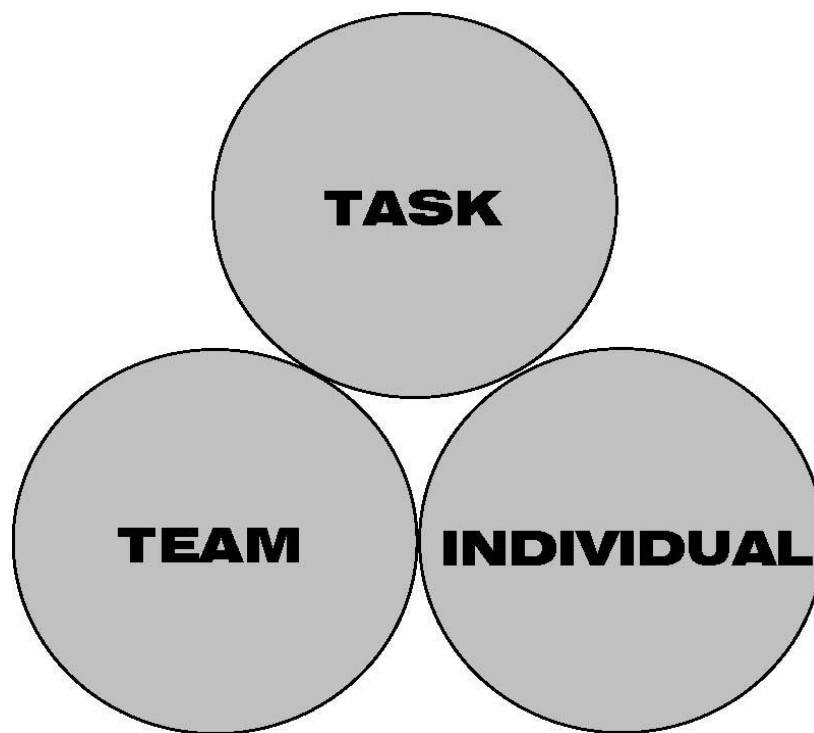
JOHN ADAIR'S 3 CIRCLE MODEL OF LEADERSHIP

This involves the team leader or manager in:

- setting objectives
- planning
- briefing
- informing
- controlling
- supporting
- reviewing

The following diagram shows how the team leader will involve himself, the team and individuals in achieving the team's objectives by effective communication and good management practice.

KEY FUNCTIONS	TASK	TEAM	INDIVIDUAL
DEFINE OBJECTIVES Identify resources and constraints.	Clarify task. Obtain information. Define accountability.	Assemble team. Give reasons why. Gain acceptance.	Involve each team member.
PLAN	Consider options. Establish priorities. Plan time.	Consult. Encourage ideas. Agree standards.	Listen. Assess abilities. Delegate. Agree targets.
BRIEF INFORM	Establish control. Brief plan. Obtain feedback.	Structure. Answer questions. Prepare and train.	Check understanding. Counsel. Enthuse.
CONTROL SUPPORT	Maintain standards. Report progress. Adjust plan. Set example.	Co-ordinate. Maintain external co-operation. Relieve tension.	Guide and encourage. Recognise effort. Discipline.
REVIEW	Evaluate results. Consider future action.	Recognise team's success. Learn from mistakes.	Appraise performance. Identify training needs. Aid personal growth.

Good leaders enable the people they lead to work together effectively. The first responsibility of the leader is to define the objective. Achieving the aim is the ultimate test of leadership. Until you know clearly what you want to achieve, you can't begin to direct other people towards the objective.

Once tasks have been defined and the team understands its goals, the individual members of the team need to have a clear understanding of their own objectives or targets.

Good targets should be:

• measurable
• time bound
• realistic
• challenging
• agreed
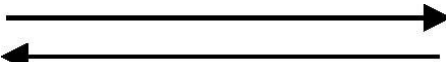
THE DIFFERENCE BETWEEN MANAGERS AND LEADERS

A MANAGER	A LEADER
Administers	Innovates
Maintains	Develops
Imitates	Originates
Focuses on systems/structures	Focuses on people
Relies on control	Inspires trust
Has a short range view	Has a short range view
Asks how and when?	Asks what and why?
Keeps an eye on the bottom line	Keeps an eye on the horizon
Accepts the status quo	Challenges the status quo
Does things right	Does the right things

LEADERSHIP BEHAVIOUR

There are different styles of leadership and different ways a leader can behave, depending on the situation and the maturity of the team being led.

The situation may mean that the leader can confidently delegate some, or all of the decision making process to the team. Equally, a more mature and skilled team will be capable of taking on more decision-making responsibility.

Manager centred leadership ⟶   ⟵ Subordinate centred leadership

Use of authority by manager

Area of freedom by subordinates

Manager makes decision and announces it	Manager sells decision	Manager presents ideas and invites questions	Manager presents tentative decision, subject to change	Manager presents problem, gets suggestions, makes decision	Manager permits staff to function within defined limits	Manager defines limits and asks group to make decision

It is the responsibility of the manager, as leader, to identify the correct style of leadership for his or her team, depending on the maturity of the team and the circumstances.

Too much hands on management and the team will feel frustrated and under valued. Too much delegation, so that it feels like the team to be abdication, can lead to a lack of respect and a fall in team morale.

There is no right style of leadership. A good leader has to lead from the front on occasions and sometimes make unpopular decisions. Equally, a good leader knows when to let go and give the team, or individual team members, responsibility for their own decision making.

DEVELOPMENT EXERCISE 1.
HOW EFFECTIVE A LEADER ARE YOU?

The purpose of this checklist is to help you identify your strengths and weaknesses as a leader. For each of the statements below give yourself a score out of 10, where 10 is totally effective and 1, totally ineffective. Be as honest as possible with your answers which you will discuss with your group in 10 minutes time. After you have completed the questionnaire answer the questions on the next page.

STATEMENT	SCORE *(out of 10)*
I set clear objectives for the people in my team.	
I have established and maintain good working procedures.	
Team targets have been quantified and agreed.	
Individual performance is appraised and opportunities given for training and development of individuals.	
I spend time communicating with individuals within the team.	
I ensure the team is given adequate resources to do its job well.	
I am able to delegate a variety of tasks to team members.	
I set and maintain high standards of performance both for myself and other team members.	
I give honest but positive feedback to individuals and to the team as a whole.	
The team is set rules of discipline that are fair, reasonable and enforceable.	

STATEMENT	SCORE *(out of 10)*
I encourage honest and open feedback between myself and members of the team. I support decisions taken by senior management but also make sure the views of my team are represented at senior level. I know my team well and they also know me. I am consistent in decision-making and am able to make hard decisions without team effectiveness being damaged. I believe in making work a happy and rewarding experience for members of my team. I ensure the team achieves consistently high results. I am able to accept constructive criticism from team members. I allow the team to take part in decision making where appropriate. The team is successful and recognised for its success within the organisation.	

How Effective a Leader are You? (cont.)

Based on the answers you have given to the questionnaire, what would you say are your strengths and weaknesses as a leader?

Write these in the box below:

STRENGTHS

WEAKNESSES

DEVELOPMENT EXERCISE 2.
FOUR QUESTIONS ON MOTIVATION

Answer the 4 questions, below. Think about what, and who has motivated you in the past and what has caused you to feel demotivated.

1   What should your company do to get the best out of you?

2   What specific things do you do to motivate your sales team?

3   Who do you find difficult to motivate? Who are your problem types?

4   Think of examples of sales managers who have motivated you. How did they do it?

MOTIVATING SALESPEOPLE

Motivation is about getting people to do what you want because they want to do it. Most of us have things we like to do and things we avoid doing.

Most of us who have children realise very quickly that you don't have to work very hard to persuade children to eat sweets, or watch television, but try getting them to tidy their room without being reminded…

The purpose of this section of the programme is to look at motivation and particularly about motivating salespeople. One theory of motivation says that motivation is a function of two states of mind; desire and expectation of success.

This can be written in the form of an equation:

Motivation = (Desire) x (Expectation of success)

Desire means wanting to do something. In sales, for example, most salespeople are wary of making cold calls to book appointments because prior experience has taught them that it is not a very pleasant experience and, therefore, most salespeople genuinely don't want to take part in this activity.

Also, they know, from their experience, that there is a very high attrition rate and most attempts at booking appointments in this way end in failure. This means their expectation of success is very low, so they lack motivation.

If, on the other hand, they are selling a product or service, which is in great demand, and they have a good chance to earn significant amounts of commission, there is a high amount of desire coupled with a high expectation of success.

In this scenario, the salesperson is likely to be highly motivated and will not need a great deal of encouragement to book appointments and make sales.

There is also a difference between external and internal motivation.

External motivation can be in the form of incentives; extra commission, or prizes for achieving sales success. This can also take the form of encouragement or coercion.

Internal motivation is where the individual wants to do something for its' own sake and enjoys the process.

The problem with external motivation is that it works in the short term, but not necessarily in the long term. Work was carried out with groups of schoolchildren in the United States who were paid to study and their results improved significantly as a result of this external motivation.

However, when the motivation was removed, results didn't just go back to pre-experiment levels, but got even worse.

So, to motivate salespeople we need to understand exactly what tasks we want them to carry out and then work at, firstly, getting them into the frame of mind where they want to do those tasks and secondly, to get them to believe that they are going to be successful in completing them.

One example here is sales targets. We can look at examples of salespeople failing to achieve target and losing motivation.

Example 1.
A salesperson is told by his manager that he is only to cold call and isn't allowed access to existing customers. He is set a target of £100,000 for his first year and it becomes clear that this is almost impossible to achieve.

Example 2.
A new salesperson is taken on and basically left to get on with it. She is given very little feedback and is set a target of £25,000, which is easy to achieve.

In the first example, despite really wanting to succeed, the salesperson loses motivation because he quickly realises he is not going to be successful.

In the second example, despite the salesperson knowing she can achieve her target, she has no desire to do so because of lack of feedback.

We need to examine our role as managers of salespeople and think of different ways to motivate them. One problem with a lot of managers is that we think that the things motivate our salespeople are different to the things that motivate us. We will see later on why this may not be the case.

MOTIVATION THEORIES

An important responsibility for any sales manager is the encouragement and motivation of members of the sales team. A number of studies have been carried out in this area that attempt to show what motivates people in their work. We will look at three theories of motivation:

1   McGregor
2   Maslow
3   Hertzberg

DOUGLAS MCGREGOR

McGregor said that managers base their actions on a series of assumptions. He says that basically there are two that they will use Theory X and Theory Y.

Theory X

a. The average human being has an inherent dislike of work and will avoid it if he can.
b. Because of this human characteristic of dislike of work, most people must be coerced, controlled, directed, threatened with punishment in order to get them to put forth adequate effort toward the achievement of organisational objectives.
c. The average human being prefers to be directed, wishes to avoid responsibility, has relatively little ambition, wants security above all.

Theory Y

a. The expenditure of physical and mental effort in work is as natural as play or rest.
b. External control and the threat of punishment are not the only means for bringing about effort towards organisational objectives. People will exercise self-direction and self-control in the service of objectives to which they are committed.
c. Commitment to objectives is a function of the rewards associated with their achievement.
d. The average human being learns, under proper conditions, not only to accept but to seek responsibility.
e. The capacity to exercise a relatively high degree of imagination, ingenuity and creativity in the solution of organisational problems is widely, not narrowly, distributed in the population.
f. Under the conditions of modern industrial life, the intellectual potentialities of the average human being are only partly utilised.

What Theory X says is that people primarily avoid responsibility, prefer being told what to do and how to do it, and aim for security in their work life. Managers who subscribe to this theory control the behaviour of the people they manage by external means, i.e. the promise of rewards or the threat of punishment.

McGregor suggests that Theory Y represents a more accurate picture of human behaviour and that people will, given the right conditions, commit themselves to achieving work objectives to a very high standard. He sees the role of manager as being to create opportunities, release potential, remove obstacles, encourage personal growth and provide guidance. This is management by objectives rather than management by controls.

ABRAHAM H. MASLOW

Maslow said that human beings have needs which have to be satisfied in a given order. Once the lower needs have been satisfied, the aims and drives of a particular individual will shift to those appropriate to the higher order needs and the satisfied lower order needs may become underestimated.

Survival	This is the first and most basic instinct. The need for food, drink, shelter, warmth, sleep, etc.
Safety	The need for security, stability, protection, freedom from anxiety, order, structure, law.
Belonging	The need to belong, be part of a group inside and outside work, have relationships and not feel alone.
Prestige	The need for self-esteem and to be valued by others. The need for independence, freedom, status, recognition, appreciation, and competence.
Self-fulfilment	The need to achieve our greater goals and reach our full potential in all areas.

In a job context, the hierarchy of needs can be expressed as follows:

Survival   To be given a job and be paid for the work you do.

Safety   To work for a reputable company under a competent manager.
                   To be given interesting work within your capabilities.

Belonging   To feel part of a team, to be listened to and contribute to the overall team
success.

Prestige   To achieve success and earn the respect and recognition of colleagues.

Self-fulfilment To be given new challenges and the chance to develop further skills.
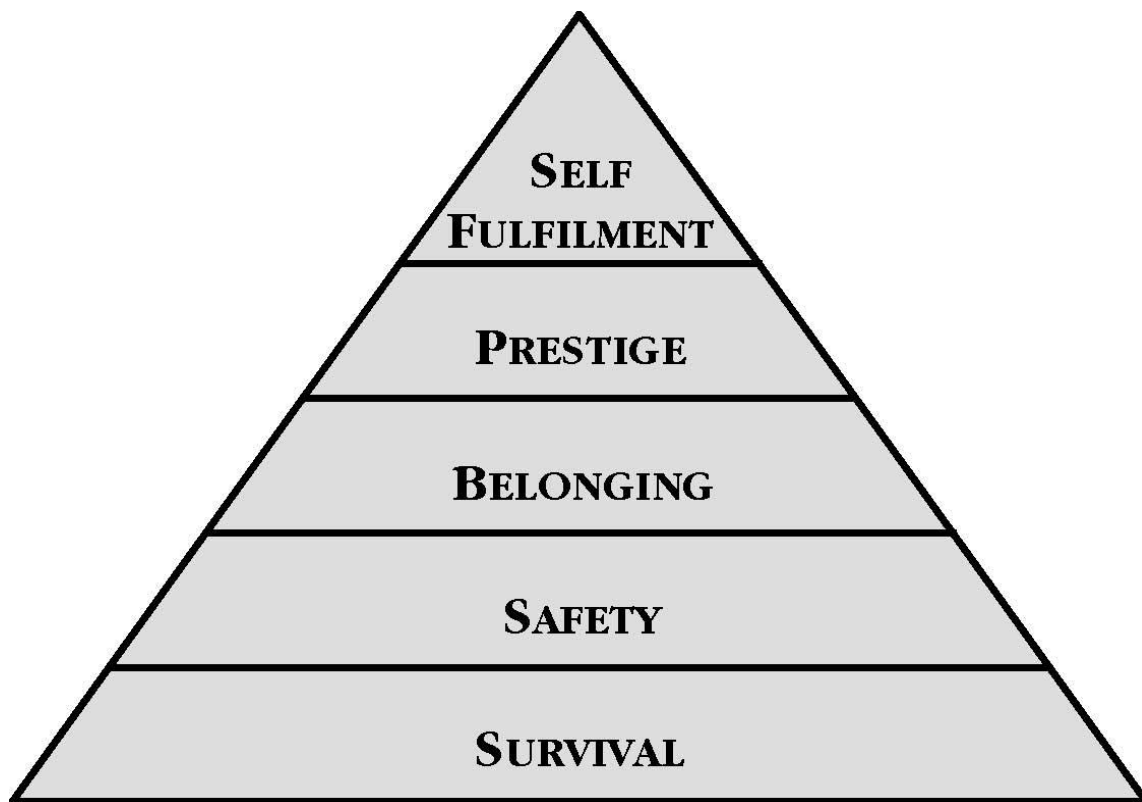
MASLOW'S HIERARCHY OF NEEDS

HERTZBERG

Frederick Hertzberg investigated the factors affecting job attitudes. He found the things that made people satisfied or dissatisfied with their jobs were not equal and opposite. He saw that some things encouraged people to perform better and called these motivators. Other things were necessary for basic job satisfaction and didn't motivate strongly themselves, however, lack of these hygiene factors could demotivate.

MOTIVATORS	HYGIENE FACTORS
Sense of achievement	Earnings
Recognition of ability	Company policy and admin.
Interesting work	Boss's attitude
Responsibility	Work conditions
Promotion	Relationships with subordinates
Growth	Personal life

This theory was controversial because it seemed to suggest people were not motivated by money. However, Hertzberg later recognised that people's sense of achievement was affected by their financial status and therefore, earnings can be both a motivator and a hygiene factor.

PRACTICAL MOTIVATIONAL TECHNIQUES

Here are some ideas for motivating salespeople:

Pay them more money. Can work well in the short term, but as external motivation it may not lead to long term improvements in performance.

Pay bonuses for exceptional achievement. This way, the bonus is linked in the mind of the salesperson to a specific bit of behaviour. This encourages repeat behaviour, which is good. Beware. Rewarding bad behaviour has the same effect.

Set achievable, but challenging targets. Targets should be set that encourage the right sort of behaviour. So, for example, if you set targets based purely on turnover you may be encouraging the salesperson to get the sale at all costs, whatever the margin.

Set targets based on activity and results. This is a good combination which encourages the right sort of behaviour and rewards achievement of results.

Negotiate targets. If targets are negotiated, especially with longer serving members of staff, there is a better chance that they will be accepted and achieved, rather if they are imposed on a take it or leave it basis.

Give regular feedback. Most demotivated salespeople say things like "I don't know how I am doing". This usually means that their manager, or immediate boss is not giving simple feedback or deserved praise on a regular basis.

Tell other people. Most salespeople respond to league tables, open praise in meetings and written feedback for specific achievements.

Punish, or discourage poor performance. If someone in the team is under-performing they should be disciplined. Partly to discourage repeat behaviour by the individual concerned, but also for the benefit of the rest of the team. One example of this is where team members receive the same bonus irrespective of their contribution. If a hard working team member sees a less hard working colleague receive the same rewards as they are why bother making a greater effort in the future?

Allow the salesperson to grow. Give people extra responsibility. Make their work more challenging and show them you trust them and value their efforts.

DEVELOPMENT EXERCISE 3. BRIDGE BUILDING

Objectives

The purpose of this exercise is to see how teams interact and solve problems. The exercise involves 2, or more teams building a structure as described in the brief, below.

The teams are split up into groups of 3 people, or more. Ideally there should be observers appointed to give external feedback to each group, if the numbers permit.

Formal leaders are not nominated, but some groups may perform this task themselves.

Have all the materials ready before the exercise begins and have copies of the observer sheets handy as required.

Ask for specific feedback. Rather than "That was good" try to get examples of exactly what was good.

After the feedback session try to relate to some of the theory we have already discussed. Questions to ask include:

•   Did the team have clear goals?
•   Was best use made of individual strengths within the team?
•   How well did the team communicate with itself?
•   What was the quality of listening that was observed?
•   Did leadership emerge from within the team?
•   What would they do differently next time?

DEVELOPMENT EXERCISE 3. BRIDGE BUILDING

Your team represents a firm of Civil Engineers who have been asked to make a competitive tender to erect a bridge across the River Swale.

You will be competing against one or more other groups who have been given the same brief as yourselves.

Your task is to bridge a gap 30 cms. Wide using the following resources:

• 24 straws
• 3 index cards (10cms. X 15cms.)
• 1 piece Blu-Tack
• 12 paper clips
• 1 piece of string 60 cms. Long

The gap will be measured by placing the ends of 2 tables 30 cms. apart. The bridge must be capable of supporting at least 1 pound coin in its' centre for 60 seconds

If all bridges are able to take the weight of the coin, further coins will be added until only one bridge remains. This will be the winning tender. You have 15 minutes planning time when your team can examine the materials, but are not allowed to start assembling their bridge.

Once the 15 minutes is over building can start and you have a maximum of 15 minutes to build the structure. After this you will be asked to take part in a feedback session to discuss how your team performed. This will take a further 30 minutes

DEVELOPMENT EXERCISE 3. BRIDGE BUILDING

Team review sheet

1. How did the team set about achieving its' objectives?

2. What did the team leader do to manage the task?

3. How effectively did the team work together? Give examples

4. How could the team have improved its' performance?

5. What have you learned from the exercise about teams and how they work?

DEVELOPMENT EXERCISE 3. BRIDGE BUILDING

Observer review sheet

Planning phase. Give examples of events, or behaviour you observed during the planning phase. How did these aid, or get in the way of effective planning?

1.

2.

3.

4.

5.

6.

Building phase. Give examples of events, or behaviour you observed during the building phase that demonstrated leadership and teamwork.

1.

2.

3.

4.

5.

6.

PERFORMANCE MANAGEMENT. THE MANAGERIAL GRID

Managing salespeople means recognising that all salespeople are at different stages of their development

How you manage a particular salesperson is a function of how well motivated that person is and how skilled

The managerial grid identifies 4 scenarios and enables us to plan how we would react if faced with managing a salesperson with different levels of skill and motivation

	HIGH	**LOW**
HIGH	Rising star	Star
LOW	Probationer	Dilemma

MOTIVATION (vertical axis label)

SKILLS

People who are new into sales tend to score low on the skills axis of the matrix and in the early stages of their time in the team may score low on the motivation side as well.

Their lack of motivation is often explained by a lack of confidence, especially if it is their first sales position. These we call **probationers** although this can be a bit misleading as sometimes experienced salespeople put into new situations, where they are having to sell, say, an unfamiliar product can lack skill and motivation, despite their experience.

Highly motivated people who need further skills development are referred to as **Future stars**. These are people who respond best to sales training as they want to do well and see training as a means of self-improvement.

People who are highly motivated and highly skilled are our **Stars**. These are like gold dust and need to be nurtured and looked after.

The biggest problems we get are with the **Dilemmas**. These are highly skilled people who, for some reason or other, have lost their motivation. They are perfectly capable of doing an excellent job, but for whatever reason, they have lost the will to perform to the best of their abilities.

One reaction of managers of Dilemmas is to send them on a training course. Why might this not be the best strategy and how do you think the Dilemma might behave during the course itself?

The way we can use this information is to think about the management of salespeople who are at different stages of their development. We all say training is important, but when is it appropriate?

We all need to be trained on a regular basis, but how might the training we give differ for the different types? Training should be appropriate to the needs of the individual, but should also take into account existing skill levels.

Another question is how do you motivate someone who is demotivated? Motivation theory tells us that.

DEVELOPMENT EXERCISE 4. PERFORMANCE MANAGEMENT

For each of the 4 types in the managerial grid, working in your group, try to identify:

1   How you would recognise each of the 4 types. What would you observe in their day to day work that would help you identify each type? It may help to think of people you currently work with, or have worked with in the past.

2   What would you do to manage each type; whether it was to move them into another segment, or to keep them where they are if that was appropriate

PROBATIONER

How to recognise them	How to manage them

DILEMMA

How to recognise them	How to manage them

RISING STAR

How to recognise them	How to manage them

STAR

How to recognise them	How to manage them

STANDARDS OF PERFORMANCE

One important aspect when motivating staff is the understanding, on both sides, of the standards of performance that are required for a job to be considered well done.

This helps the manager measure accurately and objectively how well members of the team are performing and gives each team member a clear understanding of what is expected by the organisation.

Standards of Performance should be:

1. Specific
2. Measurable
3. Achievable
4. Relevant
5. Time Limited

One of the major complaints raised by employees 'at all levels' is that they don't know how well they are doing. Standards of performance are often kept vague and undefined with a consequently negative effect on morale.

1. Specific

Standards of performance should take into account the levels of skill, knowledge and experience of the person being measured and changed as these levels change over time. They should be clearly defined and understood by all concerned

2. Measurable

Set 'objective' measurements where possible. Examples of this could be:

.   Outputs
.   Percentages
.   Frequency
.   Averages
.   Time Limits
.   Absolute prohibition
.   Reference to external standards

Some jobs are difficult to measure objectively however in each case aspects of the job will be measurable. Managers can target a range of inputs and outputs relevant to the job in hand.

3. Achievable

Standards have to be achievable or this will have a demotivating effect on the employee. However, managers with high expectations of the people they manage generally find they are rewarded with higher levels of performance.

4. Realistic

Make sure that the standards of performance relate to the task being carried out and are within the control of the person carrying out the job, i.e. Don't set standards relating quality issues that are outside the control of the person carrying out the job.

5. Time Limited

As people develop they become capable of different standards of performance so these should be reviewed on a regular basis. Also, people should be given the opportunity for feedback, on a regular basis, on their performance.

Standards will have the most value if they are clearly understood by the whole team and it can often be of benefit for these to be written down and recorded for future reference.

DISCIPLINE

For a manager to operate effectively, he or she must be able to maintain standards of discipline within the team. This does not mean the imposition of harsh rigid rules, but the creation of a working environment where all members of the team understand their roles and responsibilities.

How can a manager reduce disciplinary problems within his or her team? Here are some basic ground rules.

.   Set a good example
.   Be friendly, but not familiar
.   Build a positive working environment
.   Earn the respect of team members
.   Communicate the 'rules'
.   Recognise individual strengths
.   Keep the team informed
.   Do not accept poor performance
.   Avoid favoritism
.   Set high standards
.   Understand your authority

Set a Good Example

The way you do your job and the attitude you take towards the organisation, your team and yourself will affect the way you are seen by the people you manage and give them a model on which to base their own behaviour.

Be Friendly, But Not Familiar

Members of any team want to be friendly with their manager, but if you become too familiar, it can cause problems especially when you have to make decisions or carry out action on behalf of the company that may be unpopular.

You may need to distance yourself slightly from the team in order to remain objective and maintain discipline.

Build a Positive Working Environment

A common sense of purpose goes a long way in building team spirit so keep reminding members of your team of the common goals and everybody's role in achieving them. When recruiting new team members, try to influence the selection of people who will fit in well with your existing team and strengthen areas of weakness.

Earn the Respect of Team Members

By respecting the people in your team and recognising their needs both within and outside the organisation, you are well on your way to earning their respect. Remember respect has to be earned; it does not come automatically with the job title of sales manager.

Communicate "The Rules"

The team that you manage needs to understand the rules under which you operate and what constitutes good and bad performance. Ensure that you communicate these to each member of the team and abide by them yourself, i.e. if punctuality is important, make sure you, as manager, are punctual.

Recognise Individual Strengths

Remember that different people will have different strengths and weaknesses. Make sure, as the manager, you concentrate on building on the strengths of your team while minimising the effects of the weaknesses. Ensure that the team understands the particular strengths of individuals within the group.

Keep the Team Informed

Wherever possible, ensure that the team has as much information as possible so that the team knows where it is going and the effect of gossip and rumor within the team is minimised.

Plan regular team briefings and encourage two-way communication between yourself and the people you manage.

Do Not Accept Poor Performance

By setting high standards within your team, you will encourage excellent performance. Poor performance should not be tolerated and dealt with immediately, with help being given in the form of training and coaching.

Where a new member of the team are unable to carry out their jobs to agreed standards, despite training and coaching they should not be allowed to stay beyond the probationary period, as this will lead to problems later on.

Avoid Favouritism

There will always be individuals within the team that you prefer to other team members. Try to treat team members equally and recognise that people you may not get on with, often have qualities or skills that can improve the overall effectiveness of the team. We call this your in group, and your out group. A good piece of advice is to work on your out group. You may be surprised at the amount of talent there is within it.

Set High Standards

Your expectations of the people you manage will influence the level at which they perform. The higher standards you set, the more the team will achieve.

Understand Your Authority

Find out, before you start your job what authority you have and the power you have been given. This will ensure you do not make decisions, outside your authority, that others may wish to overturn.

COUNSELLING

Counselling is an important skill for all managers to learn. Counselling is advising or guiding a person on conduct, behaviour or future procedures. It is best carried out in private and is an enabling process that helps the person being counselled to understand how he or she is contributing to a problem and what he or she can do about it.

Counselling requires many skills, which include planning, listening, asking questions, summarising, clarifying, supporting and understanding, without being judgmental.

Planning

This is vital to create an environment that is conducive to listening and supporting. The counselling session should be arranged:

.   with no physical interruptions;
.   with no telephones;
.   at a convenient time;
.   in a quiet, comfortable atmosphere.

Listening

The importance of effective listening is that it helps you identify the 'real' problem and assist you subordinate in putting together a mutually rewarding solution. Listening is more than hearing – it involves being sensitive to the needs of your subordinates and recognising the effect you can have on the way they feel about themselves and their job.

A good listener uses silence and open questions to develop communication.

In order to counsel most effectively you should be prepared to listen for most of the time and stop yourself from interrupting and offering your solutions. The subordinate should be encouraged to explain the problem in his or her own way and you should listen out for what is **not** being said as well as what **is** being said.

Questioning

You should use open-ended questions that encourage the other person to talk and express opinions and feelings. Open-ended questions begin with phrases like:

•   "Tell me how you feel about …."
•   "How did you react when …."
•   "What was the effect of …." and so on

You should also use follow-up questions which explore more fully the answer to your original questions, or use silence to encourage the other person to keep talking.

Summarising/Clarifying

Use statements which summarise, reflect and mirror (give you an opportunity to check what you have really heard and your subordinate an opportunity to see the total picture he or she is painting).

- "So what you are saying is ...."
- "If I understand you correctly ...."
- "If I can summarise what we have discussed so far ...."

Supporting

This involves creating a trusting and confidential relationship. Let the employee know their value to your organisation. Be honest and open but wherever possible, non-threatening.

The session itself should be planned in the following way:

1   Identify the facts surrounding the problem.
2   Plan your questions.
3   Determine the benefits of them changing their behaviour both to themselves and to the company.
4   Plan how to get him or her to admit there is a problem and provide a solution.
5   Identify the positive commitment you would like to finish on.
6   Plan a follow up meeting to discuss progress.

A good way to plan the interview or discussion is to agree:

- Expected standards of performance.
- The gap between expected and actual performance.
- The 'size' of the gap.
- Who is responsible for reducing the gap.
- Action to reduce the gap.
- Measures and time to reduce the gap.
- The time and date of the next meeting.

The purpose of counselling interviews is to help your subordinates see themselves and their problems more clearly, to 'let off steam' and identify positive action for future progress.

The 5 main areas for counselling are often:

1. Keeping or losing a job.
2. Poor work relations.
3. Felt injustices.
4. Poor relationships with authority.
5. Job development.

Poor performance in one or more aspects of a job is the most common area where a manager will get involved in a counselling interview. Examples of this are:

Quantity of Work	To much, too little
Quality of Work	Overall or specific areas
Absenteeism	Frequency, predictability
Work	Withdrawal Accident prone, timekeeping, preventing others from completing tasks
Conflict	Provoking quarrels, negative team member, behavioural problems
Dishonesty	Theft, falsification of results
Targets	Too high, too low
Information Distortion	Good new in, bad news out
Decision Making	Slow, ineffective
Social Behaviour	Jokes, drinks, harassment

One of the greatest blocks to effective counselling is poor performance induced by the organisation itself. Examples of this would be:

. Tolerance of poor standards.
. Poor induction.
. Selection errors.
. Inadequate performance reviews.
. Poor training.
. Bad working conditions.
. Inadequate support.

Poor performance, however caused, can have a devastating effect on an organisation's well being.

The importance of documenting the outcome of counselling sessions is that follow up action can be taken to ensure there has been an improvement in the problem. It is important therefore to:

. Record the agreed problem.
. Record the agreed solution.
. Record the agreed action.

DEVELOPMENT EXERCISE 5. COUNSELLING

Ask members of the team, working in syndicates, for examples of situations at work where a counselling interview would have been appropriate.

This could relate to team members underperforming, not keeping to agreed standards of behaviour, conflict with other team members, attitude problems, or poor interaction with the rest of the team.

Ask each syndicate to describe one situation in depth and prepare a list of questions that they would want to ask during the counselling interview to help the interviewee explore the problem and, hopefully, come up with a solution.

Once this has been done ask each syndicate to role-play the counselling interview and ask for feedback from the whole team.

Areas to observe during the role-play:

1. Use of effective listening

2. Use of open questions

3. Use of follow-up questions

4. Summarising and clarifying

5. Supporting behaviour by the counsellor

TEAMBUILDING

As sales managers we are usually members of several work teams. There is our own team, which we manage, plus the team, to which we belong, of similar manager to ourselves. In addition there can be a range of formal and informal work teams that can be brought together to carry out certain tasks or complete specific projects

Teamwork can simply be described as a group of individuals working together to accomplish a common goal. The success of teams depends, not just on the skill or flair of individual team members, but on the ways in which the whole team works together to achieve its objectives.

Teambuilding is the process by which the team leader develops the skills of team members to work together, as a group, and achieve objectives.

Winning teams have certain characteristics:

- They know where they are going. They have clear objectives that are understood by all members of the team.

- They set realistic targets. Their targets are ambitious but achievable.

- Resources are used in energetic and imaginative ways. Best use is made of the strengths of individual team members.

- Members of the team are able to solve problems in creative ways using a wide range of potential solutions.

- The strategy of the team, that is, how it achieves its objectives, can be changed, depending on circumstances.

- Team members are trusted to pursue their part of the common task.

- Team members help each other and the style of leadership, used by the team leader, is flexible, depending on circumstances.

- The team has a confident yet realistic self-image.

- Team members handle relationships with the outside world sensitively and assertively. Members of the team understand their dependence on other work teams and recognise the value of strong external, as well as internal, relationships.

- The team is able to handle conflict in a positive way.

- The team regularly reviews its work practices and results in order to ensure it is working effectively.

- The team pays attention to its own development as well as the development of skills of individual team members.

The first stage of teambuilding is to decide where the team is at the moment and where you want it to be when it is performing successfully.

DEVELOPMENT EXERCISE 6. TEAMBUILDING

This is an exercise you can carry out with members of your team. The purpose is to identify how the team perceives where it is at the moment and where it would like to get to.

Read the next 3 pages and complete the following exercise by choosing the 10 words that best describe:

Where are we now? Exercise Sheet 1. Where would we like to be? Exercise Sheet 2. Write the

relevant words below:

Where are we now?   **Where would we like to be?**

1.   **1.**

2.   **2.**

3.   **3.**

4.   **4.**

5.   **5.**

6.   **6.**

7.   **7.**

8.   **8.**

9.   **9.**

10.   **10.**

DEVELOPMENT EXERCISE 6: SHEET 1

Where are we now

Heavy	Interesting	Soft	Traditional
Innovative	Tired	Energetic	Colourful
Respected	Closed	Learned	Outdoors
Reflective	Driven	Harmless	Feeble
Despondent	Changeable	Nervous	Solid
Polished	Fun	Open	Gloomy
Rich	Experienced	Promising	Young
Driving	Pro-active	Sheltered	Genteel
Attacked	Pressurised	Muddled	Past it
Narrow	Threatened	Inscrutable	Childish
Winning	Naive	Complex	Expanding
Dreary	Dynamic	Worthy	Worried
Distinguished	Jumpy	Fantastic	Competent
Trusting	Excitable	Confused	Belligerent
Patient	Losing	Anxious	Motivated
Supportive	Clueless	Treacherous	Threatened
Negative	Unhappy	Cheerful	Optimistic
Battling	Approachable	Reactive	Skilled
Nice	Divided	Organised	Creative
Boring	Practical	Talkative	Purposeful
Visionary	Academic	Business-like	Influential

DEVELOPMENT EXERCISE 6: SHEET 2

Where would we like to be?

Heavy	Interesting	Soft	Traditional
Innovative	Tired	Energetic	Colourful
Respected	Closed	Learned	Outdoors
Reflective	Driven	Harmless	Feeble
Despondent	Changeable	Nervous	Solid
Polished	Fun	Open	Gloomy
Rich	Experienced	Promising	Young
Driving	Pro-active	Sheltered	Genteel
Attacked	Pressurised	Muddled	Past it
Narrow	Threatened	Inscrutable	Childish
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Dreary	Dynamic	Worthy	Worried
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Negative	Unhappy	Cheerful	Optimistic
Battling	Approachable	Reactive	Skilled
Nice	Divided	Organised	Creative
Boring	Practical	Talkative	Purposeful
Visionary	Academic	Business-like	Influential

DEVELOPMENT EXERCISE 6.

Interpretation

This exercise can be completed using the team by handing out copies of the lists and getting each team member to identify his, or her key words. Identify the top 10 words in each section by writing the word on a flip chart and counting how many people in the team chose each word.

Having completed the exercise with the team, you will find that there are more words to describe where the team is now, and some of these may be a bit negative. Don't worry.

The team will chose a smaller list of words to describe where they would like to be and these will all be positive.

Having chosen this second list, you then begin to work on an action plan with the team.

For example, if the 1st word was that the team would like to be innovative, then put to the team, questions like:

- What do we mean by innovative?
- How can we become more innovative?
- What things need to happen, which are in the team's control, to begin the move towards being more innovative?
- Which individuals within the team can take ownership of the problem?
- How will we measure success, and what timescale will we set ourselves?

Because the team came up with the list they are more likely to buy the ideas that result from the exercise. Equally, they are all involved in making the necessary changes that need to take place.

The outcome of the exercise is a team action plan that can be amended over time as the team begins to develop. The role of the manager, is to facilitate change and delegate responsibility for change, within the team.

DEVELOPMENT EXERCISE 7.
WHAT MAKES SUCCESSFUL TEAMS

(Timing: 30 minutes)

This is another exercise to identify what makes teams successful and how we can improve our own effectiveness as team leaders and team members.

Begin the exercise by brainstorming with your group a list of successful teams. These could be sports teams, successful businesses nationally, or internationally, work teams that members of the group have been a part of in the past, political parties, groups, clubs, or societies.

Break the group into syndicates and ask them to choose one of the teams and in their groups, work out 10 reasons why those teams are, or were successful.

Ask each group to write their 10 reasons on flip chart paper and present these to the whole group after 10 minutes.

When these have been presented agree, by consensus, the top 10 features of successful teams.

Ask each team member to write down for each of the features:

•   Where we are now?
•   Where we want to be?

by allocating a score out of 10 for each. So, for example if we see having a clear set of goals as being a feature of successful teams and we have scored ourselves 6 out of 10 and really feel we should be a 9, what are we going to do about it?

The outcome of the exercise can be an agreed plan of action for the team and a greater awareness of team issues.

SETTING GOALS

The importance of having clearly defined goals cannot be over-emphasised. Goals are those things we wish to achieve to be more successful, happy, confident and personally fulfilled. Most people have vague or undefined goals and they tend to drift along not really aware of what they are achieving, looking upon success as being brought about by luck, good fortune, or the actions of others.

Truly successful people have clearly defined goals both in their personal and business life. They know the things they want to achieve and generally have a clear idea of how and when they are going to achieve them. This is the first stage of goal setting.

Know your objectives, set them clearly and within defined timescales. Set short, medium and long-term goals, because some goals take longer than others to achieve. Make sure they are achievable and challenging but realistic.

For example, it is unlikely that a 40-year-old middle aged man would make Heavyweight Champion of the World in 12 months, however hard he tried and therefore that goal would clearly be unrealistic and unachievable.

Having set goals that are:

• Achievable
• Realistic but challenging
• Timebound

we need to make the next step which is to do something that moves us closer to achieving our goals.

Many people know the things they want to achieve but don't do anything about achieving them. It's like the story of two people talking and one says, "I'm going to write a novel", the other replies, "Really, neither am I". In order to achieve our goals the second step is to take action. To do this we need a step by step plan, which will help us to achieve our goals.

To prepare a plan we need to know where we are now, where we want to get to, and the steps needed to move from one to the other. We may require skills or knowledge or help and advice from a third party, but the essence of goal setting and achievement is to break down the big problem into a series of manageable steps and then take action.

Often however, when people set goals and take action something goes wrong with the plan. The third step in the process is to adjust your action plan as necessary when external factors change.

One analogy we can use is that of an airline pilot who has a clear goal, i.e. to fly from London to Glasgow. He has a plan of action based on his knowledge and experience of flying that tell him where to point the plane and the steps that need to be taken to take off and land safely. However, he also needs to constantly readjust his position as weather conditions, wind speed and external factors conspire to send him off course.

By taking all three steps he achieves his goal which is to arrive at Glasgow Airport. As Managers we need to follow the following steps to identify and achieve our goals:

1   Decide what you want to achieve. Set short, medium and long term goals. Ensure there is a mix of work and social goals.

2   Ensure the goals are achievable, realistic and timebound.

3   Write down your goals and share them with a colleague or partner. Once you have committed yourself to achieving goals you become more likely to do something about achieving them.

4   For each of your goals write down all the steps that need to be taken before the goals can be achieved. This is your action plan.

5   For each step, target yourself with a specific time deadline, i.e. 'I will carry out this step by Wednesday 3 March'.

6   Begin working on your action plan.

7   Review progress regularly and make any necessary adjustments to your action plan.

8   Once you have achieved a goal or set of goals repeat the process.

DEVELOPMENT EXERCISE 8. SETTING GOALS

- The purpose of this exercise is to show how goal setting can work in practice. Working on your own, begin by listing four work-related and two non-work related goals. These should be meaningful and important to you as well as being achievable, realistic and timebound.

- This exercise can also be carried out with team members as a team development exercise that builds individual confidence and team spirit.

WORK-RELATED GOALS

1.

2.

3.

4.

NON WORK-RELATED GOALS

1.

2.

Having written down your goals, choose one that is work-related and ranked as being most important to you. Write this goal on the next page.

MY GOAL IS:

Having chosen your goal write down all the steps that need to be taken to achieve your goal. Take your time with this and think of every step that will need to be taken. These do not need to be in any particular order.

STEPS NEEDED TO ACHIEVE MY GOAL:

Having written down the steps turn over the page and prepare your Action Plan.

Prepare your action plan using the steps identified on the previous page

ACTION REQUIRED	BY WHEN

Build into your action plan a process of review so that you can amend your strategy as required.

HOW GROUPS DEVELOP*

It is important to understand that groups develop through an evolutionary process. The process can be speeded up by, for example, training in team building, but even left to their own devices, a group learns from experience and 'matures' by going through the following stages:

STAGE 1: The chaotic stage

Groups of people who are thrown together and given a task to tackle tend to underestimate the complexities of getting a group to cohere.

This is especially true if the group starts from scratch with no designated roles or previous experience of working together.

A group in the chaotic stage tries to overcome uncertainty and ambiguity by flinging itself headlong into the task in hand without giving enough, if any, attention to the process. The most noticeable characteristics of a group in the chaotic stage are as follows:

- No time given to setting clear objectives that everyone subscribes to. The group assumes that everyone knows what the objectives are.

- Inadequate time given to planning how to tackle the task.

- If a co-ordinator is appointed, no thought is given to clarifying the role and it is likely that the co-ordinator will try to impose his/her authority on a group who will not consent.

- Ideas will be voiced but not listened to and developed. Alternatively, ideas will be rejected because the level of interrupting and over-speaking will be inefficiently high.

- The success of the group will be patchy. Sometimes, despite the chaos, they will get by; sometimes they will fail. Whatever the outcome, the tendency to rationalise, i.e. to claim they did achieve what they set out to, is high.

STAGE 2: The formal stage

Eventually a group will react against the chaotic stage by tightening up and becoming more formal. They are very likely to overreact, however, and introduce formal procedures that swing the pendulum too far the other way.

* Reproduced by kind permission of Peter Honey.

The most noticeable characteristics of a group in the formal stage are as follows:

- There will be rigid, step by step, procedures for agreeing objectives and plans. Typically a group might have a system of going round the table getting everyone to have their say. They might also instigate a system whereby the objective is written up in large letters for all to see.

- The need for strong leadership is frequently emphasised. Strong leadership in a formal group means ensuring that people stick to the procedures, don't argue, don't interrupt one another, speak 'through the chair' and so on. Strong leadership is seen as the solution to the problems of the chaotic stage. If the group fails, the leader is criticised for not being strong enough!

- Different people in the group will be given specific roles, such as time keeper, secretary, and there will be explicit rules of behaviour such as only speaking through the chair, considering one idea at a time, recapping frequently from the secretary's minutes and so on.

- The success of the group will improve if the limits are sufficiently elastic to allow extra time for all the formalities.

STAGE 3: The skillful stage

Gradually a group outlives the formal stage and begins to 'take liberties' with its own procedures without slipping back into chaos. Sometimes a group rebels against the rigidity of the formal stage too early and might oscillate between the chaotic and formal stages. Sometimes a group gets stuck in the formal stage convinced that formality and rules are the only antidote to chaos.

The breakthrough to the skillful stage usually occurs when the group realises that some part of its formal procedures are inappropriate to the particular task in hand. They therefore cut some corners and in so doing discover that they can cope.

The most noticeable characteristics of a group in the skilful stage are as follows:

- All procedures for objective setting, planning, time keeping or whatever are agreed in the light of the task to be done and the situation. The procedures are therefore flexible rather than rigid.

- The co-ordinator is less directive and more participative.

- Group members, in whatever role, share equal responsibility for the success of the group.

- The atmosphere in the group is trusting and co-operative.

- The group is more successful in achieving challenging objectives.

One of the interesting discoveries about this evolutionary process is that a group operating at a skilful stage gets there via the formal stage. Just as a caterpillar is a prerequisite to a butterfly, the formal stage seems a necessary developmental step to the skillful stage. The skills acquired from rigid planning are different in degree, not in kind, from the skills required for flexible planning.

So, the formal stage is an essential step in the learning process. It is the equivalent to learning to walk before you can run.

Questions

- Looking at your own team, which stage are they in at the moment?

- What can you do to move the team up the hierarchy? (Remember, you can't move directly from chaotic to skillful, so if you are in chaotic, you have to move via the formal stage)

- Who else in your organisation can help you and your team become more skillful?

- What resources do you need?

- How supportive will team members be as you move through the process?

DEVELOPMENT EXERCISE 9. THE CUBE

The following activity can be used at team meetings to improve inter team relationships and communication skills

This exercise is designed to see how teams work, under pressure, with limited resources. It demonstrates how strengths and weaknesses within the team can affect overall performance

The team is broken into two, smaller teams, and these are given certain materials with which to construct a perfect cube, with artistic merit, that can support a jug of water on all of its' sides. Observers are appointed for each team

Because the two teams have to share resources, there is potential for conflict; just like when real teams interact internally, within organisations

Usually, during the exercise, teams fail to plan effectively and lack of communication within the team means that, while the task may be completed, the quality of the work done is fairly poor

The feedback session, after the exercise, can be a useful way of beginning to look at how the team works in real situations

Announce to the team:

> *"You are going to take part in a team exercise called The Cube. The exercise is designed to show team skills in action by*
>
> • *Observing how individual strengths and weaknesses influence teamwork and the teambuilding process*
>
> • *Identifying behaviours that will act as a restraint to team development"*

After the exercise is over, measure the size of the cubes and award marks for the 3 criteria mentioned in the brief.

Lead a discussion on the key learning points.

DEVELOPMENT EXERCISE 9. THE CUBE

You will be asked to work in one of two teams. Each team will have a team leader and will appoint an observer who will not take part in the activity. On the table you will find the following items:

> 1 pair scissors
>
> 1 Pritt stick (or similar paper glue)
>
> 5 pieces of A4 card
>
> 1 piece of A3 card
>
> 1 roll of Sellotape
>
> 4 coloured crayons (felt tip pens)
>
> 1 x 30cms rule
>
> 1 x 30cms piece of string
>
> 1 jug containing
>
> 2 litres of water

Your task will be to construct a perfect cube measuring (6cms) from the materials provided. It should be capable of supporting the jug of water on each surface. The cube should be structurally sound as well as being aesthetically pleasing to the eye.

You will score points as follows:

> **Artistic Merit**
> Cube shows signs of creativity and design :   3 points
> Cube is given some colour :   1 point
> Cube is not coloured :   0 points
>
> **Size of Cube**
> All sides equal 6cms :   3 points
> Two sides equal 6cms :   2 points
> One side equals 6cms :   1 point
> No side equals 6cms :   0 points
>
> **Structural Strength**
> Cube supports jug on all surfaces :   3 points
> Cube supports jug on fewer surfaces :   1 point
> Cube does not support jug :   0 points

The winning team will be the one that in the judges' opinion scores the most points. Participants are only allowed to use what is on the table, listed in 2, above. Your team has 40 minutes to complete the exercise.

DEVELOPMENT EXERCISE 9. THE CUBE

Review the activity by asking the following questions of participants:

1. How well did the team carry out the task?

2. How did control of resources affect the task being completed?

3. What individual strengths were observed? (Give specific examples.)

4. What individual weaknesses were observed? (Give specific examples.)

5. How did the team plan its task?

6. How did strengths and weaknesses help or hinder the task?

7. How well did members of the team interact with each other? (Give examples)

8. How well did members of the team interact with the other team? (Give examples)

MEETINGS

Meetings are called for a number of reasons. Generally, meetings are held

- to inform
- to discuss
- to decide
- to sell
- to solve problems
- to advise
- to update

or combinations of the above.

Meetings can be identified as a gathering of people sharing common or differing objectives where communication is the primary means of achieving those objectives within the group. An effective meeting is one where common objectives are achieved in the minimum amount of time while satisfying the needs of participants.

Most managers spend considerable amounts of time calling and attending meetings. If formal and informal meetings are taken into account this can take up well over half of the manager's day. The meetings log is a valuable way of measuring the time spent in meetings and should be completed periodically to measure the effectiveness of our meetings.

Meetings are rarely perfect. However, one view of an effective meeting could be summarised as follows:

- An agenda is prepared prior to the meeting.
- Meeting participants have an opportunity to contribute to the agenda in advance of the meeting.
- Advance notice of meeting time and place is provided to those invited.
- Meeting facilities are comfortable and adequate for the number of participants.
- The meeting begins and ends on time and attendees are not made to wait for late arrivals.
- The chairperson monitors how long each item takes against the agenda.
- Everyone is encouraged to take part.
- Where appropriate, everyone attending the meeting is given the chance to participate in decision making.
- The chairperson summarises the key points that have been discussed, at the end of the meeting and agrees action plans with those who have committed themselves to carry out action as a result of the meeting.
- Minutes are written up and distributed after the meeting.
- Periodically, the quality of the meeting is evaluated by participants.

Meetings need not be formal affairs with attendees sitting around a table. Informal meetings in colleagues' offices can be made equally as effective if certain basic ground rules are followed.

DEVELOPMENT EXERCISE 10.
WORKING TO IMPROVE OUR MEETINGS

1. Write down what you feel are the biggest problems that meetings cause you in your work?

2. How much of your time is spent attending meetings? (formal and informal).

3. What proportion of your time is taken up by your meetings that you consider are productive?

4. Give examples of unproductive time spent in the meetings you have attended recently.

5. How often is an agenda published prior to the meetings you attend? How effective are these agendas in practice?

6. How often is information sent out for you to read prior to attending your meetings. What effect could this have on the meetings you attend?

7. What proportion of the meetings you attend do you 'chair'?

8. What problems do you associate with chairing meetings?

9. How effective are the chairpeople at the meetings you attend? Why?

10. Are you confident you fully understand the 'purpose' of each meeting you attend?

11. In your opinion, how well planned are these meetings?

12. How could they have been planned better?

13. What, generally, are the outcomes of the meetings you attend? Are they generally successful, or unsuccessful?

14. How often are minutes taken and/or a record made of action agreed by those attending?

DEVELOPMENT EXERCISE 10.
WORKING TO IMPROVE OUR MEETINGS

Putting together our conclusions

Based on your answers to the previous exercise, make a list of ways you will try to improve the effectiveness of your meetings in the future:

1.

2.

3.

4.

5.

6.

7.

8.

9.

10.

Meeting planning worksheet

An exercise to carry out prior to running your next meeting

What are the objectives for the meeting?
(Why is it being held and what is it intended to achieve?)

When will the meeting take place?
(What time should it begin and end, and on what date?)

Who should attend?
(Who needs to be at the meeting, who does not need to attend and who needs to be informed the meeting is taking place?)

Agenda:
(What items should be on the agenda? How long should be spent on each item? Who will prepare and distribute the agenda?)

Venue
(Where will the meeting be held? What facilities and equipment are needed?)

Information
(Who needs to be informed, when, how, and by whom?)

Pre-work
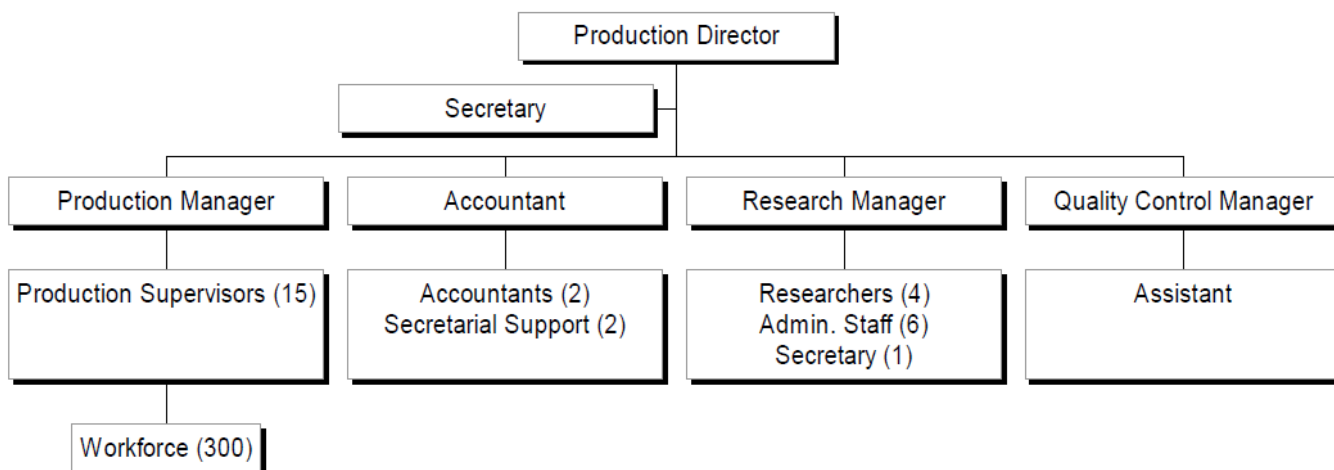(What information can be circulated prior to the meeting that will save time on the day?)

Other:
(Any other things that need to be planned prior to the meeting taking place?)

DEVELOPMENT EXERCISE 11. PREPARING THE AGENDA

Background

Organisational Chart

You have a regular monthly meeting to discuss a range of issues. Your next meeting is in 10 days time and you are aware of a number of issues that need to be covered.

1. Your 2-week annual holiday is in 3 months time between the 3rd and 16th August. Most team members take their annual break between 20th July and 7th September. You need to organise the holidays of the team to minimise disruption and will be quite happy for the team to work it out among themselves.

2. You have to decide whether to install a number of coffee and tea machines or whether to continue the current system whereby the workforce make their own drinks and staff and management have use of a team of 2 tea ladies who are employed on a part-time basis. You will wish to consult the team before making your decision.

3. You will require an update on the progress of each department head, including individual reports from the Production Managers.

4. You will be giving a brief summary of the company year end results.

5. For the next month there will be only 2 secretaries for the team's use; instead of the usual four due to maternity leave and retirement. You need the team to decide how it will share the workload. (Both of the secretaries who are leaving currently report to the Company Accountant.)

6. You have organised a talk from a researcher on a new product. The Research Manager says it will last about 30 minutes.

7. You wish to ask for an update of action that was agreed by team members at the last meeting.

8. You need to book the next meeting for 1 month's time.

Method

Put together the following items:

1. Agenda: showing what will be discussed, in which order, who will take part and approximate timings.

2. Pre-work: decide what pre-work, if any, should be completed by team members before attending the meeting.

3. Memorandum: draft a memorandum informing team members of the date and time of the meeting, who should attend etc.

AGENDA

PRE-WORK

MEMORANDUM

DEALING WITH DIFFICULT PEOPLE IN MEETINGS

In meetings problems often arise because the people who attend have conflicting objectives. One role as chairperson is to manage and resolve conflict wherever possible.

Here are some examples of difficult situations you may meet:

1. One person or persons dominate the discussion

This problem must be avoided if the chairperson is to keep control of the meeting and enable all those attending to play an active part. This typically could involve a senior member of the group or someone with specialist knowledge.

The chairperson must involve others without directly attacking the ego of the person involved. Use of assertiveness techniques can enable the chairperson to dissuade this type of person from dominating the meeting. For example:

"That's very interesting George. I'm sure the others will wish to add their opinions to this topic. Jane, how do you feel .."

"Before you go on, let's get some feedback from the others..."

2. People are not contributing to the meeting

This can happen for a number of reasons:

a. The person is shy and afraid or nervous of speaking.
b. The person is angry and refuses to speak.
c. The person is bored and can't be bothered to speak.

Where someone is shy or nervous it is the chairperson's job to firstly observe who is, and who is not taking part in the meeting. If the person is shy or nervous, bring them into the meeting gently, choosing subjects that you know they are confident discussing.

Protect them initially from the stronger members of the group in order to build up their confidence.

Angry people may bottle up their emotions. Many chairmen feel uncertain in these circumstances and try to avoid conflict by ignoring the situation. The problem is, the situation does not go away.

It is best to get feelings out on the table while ensuring that others in the meeting are defended in the process. Keep cool, calm and logical. Ask how the person feels. Be supportive and friendly to the person even if you have to be hard on the problem.

In these circumstances the chairperson may need to stay neutral, supporting management and avoiding

inter-departmental slanging matches.

Where resolution of the problem is not possible focus the attention of the meeting back onto the meeting objectives and see what can be achieved.

If people are bored and can't be bothered to speak ask yourself the questions:

- Why are they bored?
- Is the meeting relevant to them?
- Should they be there?
- Is the topic under discussion relevant and important?
- Is the meeting room causing the problem?
- Do they need to be somewhere else?

Here you should assertively ask the individual what is the cause of the problem. This should be done in a non-threatening way. Explain that you are concerned that everyone gets maximum benefit from the meeting.

Sometimes in meetings conflict is inevitable. Where a high degree of honesty and trust exists within a group of people conflict can be constructive. In many cases different personalities and competition between departments and rivalry between individuals can help solve problems and produce innovation.

This can mean:

- There is increased motivation and energy to carry out the task.
- Different opinions spark off innovative solutions
- Issues are brought to the table and therefore have to be resolved.

Conflict in meetings sometimes occurs because individuals fail to communicate effectively, perceive things differently, have different values and are looking for different outcomes.

Part of the Chairperson's role is to keep the team focused on issues rather than individuals, to sit back and listen to the perceptions of individuals, to mediate where there is genuine divergence of opinion and to remind the group of its common goals.

The chairperson should handle conflict positively by

- wherever possible staying neutral
- clarifying objectives
- helping different sides see the other point(s) of view
- facilitating inter-group communication
- focusing on the problems not the individuals
- generating alternative solutions
- setting apparently irreconcilable differences to one side (this helps save face and move the meeting forward)
- keeping the meeting and issues in perspective

NEGOTIATING SOLUTIONS IN MEETINGS

Objectives

- Our objectives when using this technique should be to ensure that all parties to the negotiation achieve a satisfactory outcome and have needs which are looked after, as a result of the negotiation.

The issues

There is a choice for negotiators to use adversarial bargaining, that is to take a position, defend it, make minimum concessions and end up with a compromise position that lies somewhere between their position and that of the other side. This is the most common form of negotiation. It can often be counter-productive producing compromises where no one is really satisfied.

The alternative is a less combative approach which seeks to reach agreement by both parties understanding the merits of each others case and attempting to arrive at a solution which benefits each party more than a straight compromise position.

The method

With adversarial bargaining both sides have an idea of what they want to achieve. Each makes an opening bid (usually asking for more than they expect to receive) and by a series of moves in their position, hopefully arrive at a satisfactory conclusion. Let us look at an example of where this approach can be counterproductive.

> There is an old story about two girls who were sisters and who were given an orange. Both wanted the orange and a compromise was reached whereby the orange was sliced in two and each got half.
>
> Each sister went away. One peeled her half of the orange and ate the fruit, throwing away the peel. The other, peeled her half and threw away the fruit using the peel to bake a cake.

Both sides could have been more satisfied had they understood each others needs more fully. This is an example where positional bargaining arrives at a solution that is 'equal', but not best. The alternative approach is a problem solving approach, which requires trust, openness and honesty. However, it need not be a soft approach as it is possible to drive a hard bargain by using objective ways of measuring what is fair and reasonable in the negotiation.

To use the method successfully there are certain ground rules that need to be agreed beforehand:

- All sides see themselves as having an interest in solving the problem.

- They need to agree at the outset to act honestly and in a reasonable way recognising that all parties have needs (and feelings!).

- Rather than taking up fixed positions they spend time exploring the problem and the specific needs of all parties.

- They look at a range of solutions based on objective measures of what is fair and reasonable.

We need to understand the difference between needs and positions:

- A position is something you have decided upon, i.e. I will ask for a 10% increase in salary and a wider choice of company car. Needs cause you to make decisions on your position, i.e. financial security, keeping salary in line with inflation, status among colleagues etc.

- Don't assume that because the other side has an opposing position he does not have common or similar needs.

If you are negotiating with your boss he may well be unwilling or unable to pay you 10% more. He may however have an interest in keeping your salary in line with inflation, ensuring that you have financial security and making sure you don't feel you are losing ground in comparison with your colleagues. Therefore, you have different positions but similar interests.

The method we will use for negotiating in meetings involves us going through a series of steps, having established and agreed the ground rules.

Firstly, the preparation. Using the worksheet provided:

1. Write down how you perceive the problem.

2. Write down how the other side perceives the problem. Their perception may be different from yours and you may not like it. However, understand their perception is valid to them.

3. Put together your proposal and analyse its pro's and con's objectively.

4. Write down, honestly and objectively, what is preventing the other side from doing exactly what you want them to do, today.

5. Decide who else will be affected by the outcome.

6. Write down the other sides' needs in order of preference.

7. Generate alternatives that might begin to satisfy both sides.

8. Decide what you will do if negotiation proves impossible.

In the negotiation itself the first thing you should do is to clarify the perception of both sides. Be non-judgemental and spend the first part of the negotiation finding out how the other side sees the problem. Describe their problem to them and see if your perceptions match. Ask them to describe your problem to you. Do they understand your needs?

In generating solutions use objective measures of what is fair and reasonable. Objective measures could include:

market prices	tradition
standard practice	equal treatment
fair procedures	previous decisions

Whatever measures are chosen and agreed there will be a number of options that could satisfy both parties. Nonetheless, should it be impossible to find a negotiated settlement, before you walk away be sure you know where you can go to and prepare before the negotiation an alternative should negotiation prove impossible.

In this case you should, prior to entering the negotiation:

- prepare a list of alternatives
- select the best option available

in case resolution of the problem proves impossible.

Many people find this method, at first, difficult to cope with because it is perceived as being a soft approach which relies on trust between the parties. However, in practice, the method can produce better results than the positional approach whereby each side takes up a fixed position and defends it while attacking the other side.

In negotiation it is possible for all sides to win. Understanding the needs of others and making sure they understand your needs can achieve better results and save time and energy in your negotiations.

NEGOTIATING SOLUTIONS IN MEETINGS

Worksheet

Complete the following worksheet prior to entering into 'negotiation'. You may wish to complete this using an existing problem that needs to be negotiated with your team.

How do you perceive the problem?

How does the other side see the problem?

What is your proposal?

What are the pro's and con's of your proposal?

FOR	AGAINST

What is preventing the other side from doing what you want?

Who else will be affected by your decision?

What are the other sides' 'needs'?

Produce alternatives that might satisfy both sides.

DEVELOPMENT EXERCISE 12.
NEGOTIATING SOLUTIONS IN MEETINGS

Role-play. Team leader's brief

Method

1. Break the group into two teams. Hand out the role-play briefs, one brief to each team, and send each team into a separate room to prepare the negotiation. Hand out copies of the 'Negotiating in Meetings' worksheet to help with the preparation.
2. Each team should appoint three representatives to take part in the role-play. The rest of the team will help to prepare the negotiation, act as observers during the negotiation and advise their negotiating team, should a break be called during the negotiation.
3. Allow 45 minutes for preparation.
4. Bring the representatives together around a table and place observers where they can observe the role play. Brief the teams by saying they have 45 minutes to reach agreement. Allow the teams to take a break during the negotiation, should they need to go away and consider their position at any point.
5. After agreement has been reached ask the teams to spend 10 minutes in their separate syndicate rooms with both copies of the negotiation briefs and see whether they could come up with a solution that would suit both parties better than the final agreement reached during the negotiation. This is usually possible. If agreement is not reached after 45 minutes the chairperson should act as mediator using the method identified earlier to reach an acceptable solution.
6. Bring the whole group together and discuss the process of negotiation as it was observed. Ask questions like:

   a. What examples were seen of 'positions' being taken up by either side?

   b. How did each side react? What effect did this have on the negotiation?
   c. What examples were seen of good and bad communication during the negotiation?
   d. How did communication affect the final outcome of the negotiation?
   e. What role could a neutral chairperson have played during the negotiation?
   f. What value is there in having a neutral third party involved in this type of negotiation?
   g. What feelings did the negotiators experience as the negotiation progressed?
   h. What lessons does the exercise teach us about problem solving and decision-making in meetings? (20 mins)

Total Time: 120 mins.

DEVELOPMENT EXERCISE 12.
NEGOTIATING SOLUTIONS IN MEETINGS

Role-play. Chairperson's brief

Your team represents the Chairperson and MD of an engineering company. You employ 500 people broken down into:

Directors	8
Senior Managers	19
Managers	36
Staff	89
Production Workers	348

You have decided that your company needs to be brought up to date and one major problem you have is over the status of various groups in the company.

One example of this relates to breaks and meal times. The staff and management groups are allocated a 15 minute break, morning and afternoon, when coffee and tea are served at their desks by a team of two tea ladies. Production workers however have to make their own drinks using their own tea and coffee, which they bring from home and milk, purchased from the works canteen.

You are aware that the difference in status this causes is a problem, however you cannot contemplate employing extra staff to provide tea ladies for the whole company.

Currently staff and managers are provided with their drinks free of charge although they also are allowed to purchase confectionery, which provides you with a small profit.

You have approached your personnel director in the past about the introduction of drinks and food vending machines which could be subsidised by the company and supply everyone in the company with their needs. This would cost roughly the equivalent of what would be saved on the current cost of providing free drinks to the staff and directors and the wages of the tea ladies, however you have a feeling that workers may complain about the quality of drinks from a vending machine and may prefer the 'old ways'. You know your Personnel Director would support change but over a much longer timescale than yourself, i.e. months or years rather than weeks.

You are progressive, forward thinkers and would ideally like to see a solution where all employees have equal status, including one eating area. The canteen is currently segregated between workers, staff and directors. You are concerned not to incur additional costs wherever possible and would like to see a solution put into practice within the next 4 weeks. You would also like to see, a reduction in the 250 man hours lost per day through employees taking their 15 minute tea and coffee breaks. You see no justification for this 'down-turn' in production, whether for staff or workers.

Your chairperson is in his first year with the company having been recruited in from a major Japanese company. You wish to negotiate agreement on this issue with the team representing the Personnel Director at your next meeting.

DEVELOPMENT EXERCISE 12.
NEGOTIATING SOLUTIONS IN MEETINGS

Role-play. Personnel Director's brief

Your team represents the Personnel Director of an engineering company. The company employs 500 people broken down into:

Directors	8
Senior Managers	19
Managers	36
Staff	89
Production Workers	348

You are aware that your Chairperson and MD is concerned over the provision of free tea and coffee to staff and management, whereas these have to be provided by the workers, for themselves, using their own tea and coffee, with milk they purchase from the works canteen.

He is also concerned that all workers and staff have traditionally been given a 15 minutes break morning and afternoon. With 500 staff this represents 250 man-hours per day in lost work. You know that any change in the system of tea and coffee breaks will be most unpopular and resisted by all concerned.

From previous discussions you know he would like to see vending machines introduced for everyone, selling drinks and snacks. He would be prepared to subsidise this although it would mean sacking the two tea ladies who have been employed by the firm for over 20 years each.

It is they who serve the tea and coffee to members of staff during their breaks. This would be a most unpopular move and one, which would affect both staff and workers who know the two ladies well.

The tea ladies sell confectionery and snacks currently on their 'rounds' and this produces a small profit of around £250 per year. This is currently donated annually to the BBC Children in Need appeal.

DEVELOPMENT EXERCISE 12.
NEGOTIATING SOLUTIONS IN MEETINGS

Observer sheet

How well did your team prepare for the negotiation? (Give examples.)

How well did they understand the needs of the other side? (Give examples.)

How well did each side communicate during the meeting? (Give examples.)

How satisfactory was the final outcome to both sides?

WAYS OF IMPROVING OUR MEETINGS

Here are some ideas for making the meetings we run and attend more effective:

1. Ask yourself why you are holding the meeting. Is there some other way of achieving your objective?

2. Review the need to hold regular (monthly, weekly) meetings.

3. Write the meeting objectives on a flip chart at the beginning of the meeting.

4. Only invite those who need to attend.

5. Change the venue of regular meetings.

6. Give someone else the chair for the next meeting.

7. Hold a stand-up meeting.

8. Review your starting and finishing times.

9. Spend 10 minutes at the end of the meeting evaluating how successful it was.

10. Invite people to attend the meeting then leave when their contribution is over.

11. Start and end meetings on time, every time.

12. Listen more and talk less at your next meeting.

13. Consider alternatives to holding the meeting.

14. Prepare a full agenda showing start and finish times.

15. Send out minutes or action plans within 24 hours of the meeting.

16. Ensure everyone who attended the meeting was given the chance to contribute.

DEVELOPMENT EXERCISE 13.
HOW TO IMPROVE OUR MEETINGS

A team exercise in group decision making

Method (Follow the rules exactly)

1. Write on the flip chart: 'How can we improve our meetings?'. Explain to the team that this relates to their meetings.

2. Explain that everyone is free to suggest ideas. Make it clear that all ideas, no matter how absurd or wild should be contributed and that there must be no discussion of an idea; as soon as one is introduced go onto the next one.

3. Ensure during the brainstorming period that everyone sticks to the rules. Ask for a volunteer to write the group's answer on the flip chart.

4. Brainstorm the topic for 15 minutes. List without discussion every idea that is suggested. Ideas will come quickly at first then more slowly. Ensure you use the full quota of time to give delegates time to think of every idea they can.

5. Break the group into two syndicates and get them to rank their top 20 items. (10 min).

6. Have these typed up and circulated after the meeting is over.

7. Share your own ideas or those given on the handout 'ways to improve our meetings'. (5 mins).

Total time: 30 mins.

RUNNING MORE EFFECTIVE MEETINGS. CHECKLIST

A checklist of key points

1   I am aware of the basic problems with running effective meetings, and have decided to work at improving the quality of my meetings ☐

2   I set clear objectives before each of my meetings ☐

3   I arrange a suitable venue for each meeting ☐

4   I put together a clear agenda for each meeting and allow others to contribute to the agenda, where appropriate ☐

5   I send out information prior to the meeting, to save time during the meeting and ensure those attending arrive fully prepared ☐

6   I allow everyone in the meeting the opportunity to contribute and try to avoid one, or more people dominating the discussions ☐

7   I set time targets for agenda items and ensure, wherever possible, these times are kept ☐

8   I am able to deal with difficult people in a positive way ☐

9   I set aside time during my sales meetings, for training and team development ☐

10   I ensure minutes are sent out on time and any action points agreed in the meeting are followed up ☐

DEVELOPMENT EXERCISE 14. ACTION PLANNING

Having worked through the manual, produce an action plan, either for you as an individual manager, or for your team, to continue the development process.

ACTION POINT	BY WHEN