BSB 7.0

BSBCMM511

COMMUNICATE WITH INFLUENCE

Aspire Learning Resources

BSBCMM511

Communicate with influence

Release 1

Learner Guide

Aspire Version 1.1

Learning Resources

Aspire also has learning resources available in these areas:

- Foundation skills
- LLN and employability skills (non-competency)
- Community services
- Early Childhood Education and Care
- Allied health

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BSBCMM511 Communicate with influence, Release 1

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First published October 2020

Cover design: Anne-Marie Reeves Design
Printer: Doculink Australia Pty Ltd, 1d/28 Rogers Street, Port Melbourne VIC 3207

e-ISBN 978-1-76075-915-5 (PDF version)
ISBN 978-1-76075-914-8

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CONTENTS

Before you begin

This Learner Guide is based on the unit of competency *BSBCMM511 Communicate with influence*, Release 1. Your trainer or training organisation must give you information about this unit of competency as part of your training program. You can access the unit of competency and assessment requirements at:
www.training.gov.au.

How to work through this Learner Guide

This Learner Guide contains a number of features that will assist you in your learning. Your trainer will advise which parts of the Learner Guide you need to read, and which Practice Tasks and Learning Checkpoints you need to complete. The features of this Learner Guide are detailed in the following table.

Feature of the Learner Guide	How you can use each feature
Learning content	Read each topic in this Learner Guide. If you come across content that is confusing, make a note and discuss it with your trainer. Your trainer is in the best position to offer assistance. It is very important that you take on some of the responsibility for the learning you will undertake.
Examples	These highlight key learning points and provide realistic examples of workplace situations.
Practice Tasks	Practice Tasks give you the opportunity to put your skills and knowledge into action. Your trainer will tell you which practice tasks to complete.
Summaries	Key learning points are provided at the end of each topic.
Learning Checkpoints	There is a Learning Checkpoint at the end of each topic. Your trainer will tell you which Learning Checkpoints to complete. These checkpoints give you an opportunity to check your progress and apply the skills and knowledge you have learnt.

Foundation skills

As you complete learning using this guide, you will be developing the foundation skills relevant for this unit. Foundation skills are the language, literacy and numeracy (LLN) skills and the employability skills required for participation in modern workplaces and contemporary life.

The following table provides definitions for each foundation skill.

Foundation skill area	Foundation skill description
Writing	▪ Prepares documentation that summarises key findings and outcomes ▪ Prepares presentations appropriate to audience needs, context and purpose
Oral Communication	▪ Uses active listening and questioning to seek information and confirm understanding
Teamwork	▪ Selects and uses relevant conventions and protocols when communicating with team members
Self-management	▪ Demonstrates sophisticated control over oral, visual and/ or written formats, drawing on a range of communication practices to achieve goals
Problem solving	▪ Uses analytical processes to evaluate options, and aid in problem-solving and decision-making ▪ Plays a lead role in situations requiring negotiation and collaboration, demonstrating high level conflict resolution skills and ability to engage and motivate others
Initiative and enterprise	▪ Adapts personal communication style to build trust and positive working relationships and to show respect for the opinions and values of others ▪ Understands the implications of legal and ethical responsibilities to maintain confidentiality ▪ Selects relevant vocabulary adjusting language
Planning and organising	▪ Plans, organises and implements tasks required to achieve required outcomes

What do you already know?

Use the following table to identify what you may already know. This may assist you to work out what to focus on in your learning.

Topic	Key outcome	Rate your confidence in each section
Topic 1: Identify communication requirements	1A Identify information needs of audience	❑ Confident ❑ Basic understanding ❑ Not confident
	1B Confirm organisational policies and procedures for communication	❑ Confident ❑ Basic understanding ❑ Not confident
Topic 2: Negotiate to achieve agreed outcomes	2A Identify objectives and issues	❑ Confident ❑ Basic understanding ❑ Not confident
	2B Prepare position and supporting arguments	❑ Confident ❑ Basic understanding ❑ Not confident
	2C Participate in negotiation and confirm outcomes	❑ Confident ❑ Basic understanding ❑ Not confident
Topic 3: Participate in and lead meetings	3A Identify need and prepare for meeting	❑ Confident ❑ Basic understanding ❑ Not confident
	3B Conduct meeting	❑ Confident ❑ Basic understanding ❑ Not confident
Topic 4: Make presentations	4A Prepare for presentation	❑ Confident ❑ Basic understanding ❑ Not confident
	4B Present and provide opportunities for audience to ask questions	❑ Confident ❑ Basic understanding ❑ Not confident
	4C Evaluate presentation	❑ Confident ❑ Basic understanding ❑ Not confident

Topic 1 | Identify communication requirements

1A Identify information needs of audience

1B Confirm organisational policies and procedures for communication

1A Identify information needs of audience

Influencing your audience means convincing them to adopt your perspective.

Whether it be a sales pitch, a new strategy or just an idea, we are constantly trying to influence others to adopt or agree with our perspective. Yet everyone reacts differently to information and ideas. Each person's responses are filtered through their own culture, life experiences, knowledge, personal beliefs and values.

An audience brings with them expectations, knowledge and attitudes about the occasion, the topic and the speaker. Factors that may influence how your audience responds include:

- age
- sex
- culture
- religion
- ethnicity
- sexual orientation
- occupation
- education.

You may need to use various strategies to influence diverse audiences. Here are some ways that you may influence your audience to accept your ideas and information.

Contextualise your presentation

Contextualise your content to the audience's needs and expectations. This means preparing your presentation so that your audience can relate to it, using points of reference they are likely to understand. Providing a context will help your audience connect with your message and keep them engaged.

Use case studies, stories or real-life examples to bring the audience into your space and incorporate them into your presentation.

Appeal to self-interest

Appealing to the needs and expectations of your audience members is a powerful way of gaining their acceptance, provided your idea does address their needs.

Explain how members of the audience can individually benefit from your solution compared to the current situation.

Motivating factors you can use include power, pride, self-respect, recognition, security and reward. For example, a new work process could be sold on its greater efficiency, leading to reduced workload for employees.

Involve the audience

In a one-way conversation, the speaker can dominate the narrative without really acknowledging or interacting with the audience. In a two-way conversation, the speaker directly connects with their listeners.

A two-way conversation is a dialogue where the presenter speaks and listens to the audience, responding to their reactions and questions.

To gain the respect of your audience and encourage them to accept your idea, involve them in your presentation. For example:

- Plan a question and answer time.
- Give audience members a role in the presentation.
- Organise activities so that audience members can contribute to implementing your idea.

For people to accept and be fully committed to the successful implementation of your idea, they must listen and fully understand the implications of the situation.

Prepare to listen to objections

There is usually a person or group who may oppose or challenge your idea. Don't try to suppress objections. If you don't give people the opportunity to explain their objections you can create the impression that you are covering up flaws in your idea and deny yourself the opportunity to clarify the information. Don't argue with audience members or try to embarrass them in front of others. Your earlier research and analysis should have prepared you to anticipate and overcome most objections.

Present your idea effectively

The key to a successful presentation depends on the way you explain and deliver your ideas and solutions.

Make your content easy to understand, show that it has been well thought out and that it is the best solution available under the circumstances.

Be prepared to vary your presentation to accommodate for individual needs, particularly those of people who are required to take action or provide resources for implementing your idea.

Show enthusiasm and passion for your idea – the audience can tell if you are unsure or uncertain about any aspects.

Consider linguistic style

Everything you say must be said in a certain way – using the right tone, speed and volume.

Linguistic style refers to a person's speaking pattern, which is unique to them. It is made up of culturally learned signals that are used to communicate and understand meaning. A person's style might include:

- the pace, number and length of pauses
- word choice
- the use of humour, stories and questions.

Your own linguistic style and the style of your audience members influences how they respond to your ideas.

Be prepared to negotiate

One way of encouraging acceptance of your idea is to make concessions on certain points. This is particularly important when people expect negotiation.

To prepare, identify the aspects of your proposal that are not essential to achieve your objective. You can trade these for others that are essential to the success of your idea.

Identify your audience

By understanding your audience, you are better able to tailor your communication in a way that makes it more relevant and meaningful to participants.

Effective communication means conveying information appropriately using a variety of communication methods. How you convey information after it has been gathered and interpreted depends on its nature and purpose and who it is for. The communication method and content selected can vary significantly between different groups of people.

Be clear about your purpose in communicating the information, and consider the way in which the message will be received by your audience. The characteristics and needs of the audience determine how you structure and deliver your message, its length, the resources required and the communication strategies you use. This also includes presentation skills you may need to be aware of, such as your rate of speech, your tone and the specific language you use.

Some characteristics may lead you to seek advice and support from specialists such as language, literacy and numeracy (LLN) specialists, or organisations with expertise in working with different cultures or with learners who have special needs.

Here are some audience characteristics you need to consider when identifying communication requirements.

Age

Various age groups interpret information differently. The target audience may be of diverse ages (in a presentation to a community group, for example) or the majority of members may be of a similar age (a presentation to a sporting team or school group). While it is important to avoid stereotyping the members of the target audience, be aware that their life experiences can shape the way they interpret information and respond to what you say.

When making a presentation to a group of people of a similar age, find out as much as you can about the characteristics of the group, including their preferred method for receiving information. For example, older audience members may prefer to receive printed materials rather than being given a DVD containing presentation materials.

Culture and language

Reflect on the diversity of members of the target audience and plan a presentation that includes culturally relevant presentation strategies.

- Learn about their cultural background to ensure that you understand differences in communication, body language, male/female interactions and terminology.
- Be mindful of any religious or spiritual beliefs that audience members hold that may affect their participation in the presentation, and accommodate these sensitively.
- Avoid colloquial words and phrases that may cause confusion.
- Model behaviour and attitudes that promote culturally inclusive work practices.
- Avoid slang/colloquialisms and cultural stereotypes in your language and in any anecdotes, humour and support materials that you use.

Educational background

Consider your audience's prior work experience, qualifications and general life experience. These factors may influence their understanding, how actively they participate in the presentation session, and the existing skills and knowledge you can build on. Knowing this kind of information in advance is helpful for planning, but you must also be prepared to respond to what you learn during a presentation.

Integrate activities into the presentation that ask people to draw on their experience and strengths, and to work collaboratively. Make sure information on slides and handouts is in plain English, and clear and easy to read. Always define technical words or industry jargon.

Gender

In general, avoid trying to customise your presentation to suit the characteristics of a specific gender unless you have specialised knowledge in the area of gender differences, such as the way each gender interprets body language, their communication styles and methods of processing information.

In your delivery, model non-sexist language and avoid cultural (including gender-based) stereotypes; for example, use case studies that include women in non-traditional roles and reflect the diversity of modern family structures.

Be aware of how you will promote equal participation in the presentation by asking questions of both men and women and encouraging women to take the lead in group activities, where relevant.

Physical ability

The target audience may include people of varying physical abilities. Compliance with anti-discrimination legislation and organisational access and equity policies may demand that an environment is provided to accommodate the needs of individual audience members. If presentations include skills practice, participation in simulations or operation of equipment or technology, you should be aware of your obligations and be mindful of duty-of-care considerations.

To accommodate specific needs, you may:

- request the support of an aid such as a scribe
- ensure that any special equipment is available
- ensure that there is appropriate access to the venue and facilities
- arrange specialist support
- modify the environment
- use adaptive equipment and technology.

Literacy

Audience members who experience difficulty with LLN may feel vulnerable or inadequate and be embarrassed to speak out or participate. Identify any LLN issues before your presentation and arrange appropriate support. This may be challenging when you are presenting to a large group, or where details about individual audience members are unknown.

Presenters can promote and encourage a supportive learning environment by ensuring that there are multiple learning experiences so that all audience members have an opportunity to participate in an appropriate way. Providing resources, using audio-visual displays that are pitched at an appropriate level, and including relevant diagrams and images is also helpful.

Previous experience

Audience members may have previous experience with a topic that is the focus of a presentation. This experience may have been gained at work, in previous training and education or in their general life experience. Be aware that these factors may influence a person's attitude toward the topic, their attention levels during the presentation and the types of questions they ask.

Identify your purpose

Decide on a purpose to help focus your position.

Whether you are introducing a new product or service to potential customers, pitching a creative idea to potential investors or introducing a proposal for change in an organisation, your objective is always the same: to communicate the message clearly and concisely to the audience.

Here are some different purposes for presenting information to others. All can be used to influence your audience.

To inform

The purpose of your communication could simply be to give someone facts or information – to tell them something they may find beneficial. For example, you may be asked to announce a colleague's promotion or retirement; or to let existing customers know about an improvement to a service. This type of communication is usually short, to the point and concentrates on the facts of the situation. The information presented should be simple, and the audience should fully comprehend the subject matter just by listening to you speak about it.

To instruct

The purpose of your communication could be to instruct others on how to do something. Instead of just providing information, you may need to give specific directions, instructions or orders. For example, you may need to instruct employees on how to use a new record management system in the workplace. This type of communication is usually longer than an information speech. Cover your topic thoroughly so your audience absorbs the instructions and develops a new skill in the process. Try to provide opportunities for the audience to practise the new skill.

To inspire

The purpose of your communication may be to inspire or motivate people. Some people inspire others by talking about how they personally triumphed over hardship. Others may provide motivational speeches that encourage people to change their behaviour. For example, you may present a new staff fitness program in your workplace that motivates workers to adopt healthy lifestyles. These types of communication should be delivered in a way that helps your particular audience to respond positively.

To activate

The purpose of your communication may be to stimulate the audience to take action. A presentation designed to activate, presents ideas, suggestions and arguments in such a way that the audience believes and accepts the information, and carries out the suggestions. For example, you may need to make a fundraising presentation to potential donors to convince them to contribute to your cause. In these situations, get people to act on your ideas by telling them what to do and emphasising the importance of them taking action. For this type of communication to be effective, be firmly convinced that the course of action you are urging is the right one.

To persuade

A persuasive communication offers a solution to a controversial problem, presenting sufficient logic, evidence and emotion to convince the audience to accept your idea. For example, you could be launching a new product that solves a customer's problem more efficiently and effectively than anyone else. This type of communication should cause the audience to willingly accept your proposal through logic, evidence and emotion.

Choose a communication method

Communication methods will be driven by your intended purpose and the needs of your audience.

Your choice of communication method will largely depend on your purpose, as well as your audience and their needs. More than one communication method may be necessary to get your message across and allow for discussion and feedback.

Communication involves more than speaking and writing. It should include opportunities for two-way interaction, listening, exchanging ideas, consultation and negotiation, as well as non-verbal communication. It is helpful to invite input from work colleagues when examining the implications of decisions or to involve them in the process to ensure they are committed to the outcomes. There are advantages and disadvantages of using various communication methods.

Verbal – individual

Examples: face-to-face contact, telephone conversations.

Advantages: clear message; direct and instant; provides opportunity for interaction

Disadvantages: inconsistency of message across similar exchanges; message may be misunderstood if communication skills are poor; time-consuming

Verbal – group

Examples: meetings, discussion groups

Advantages: sends consistent message; provides opportunity for questioning and sharing; provides chance for agreed approach

Disadvantages: time-consuming; cumbersome; different personality types can dominate or withdraw

Written – electronic

Examples: emails, intranet postings

Advantages: quick and efficient; sends consistent message; is visually effective

Disadvantages: cannot be sure message is read; message may be misinterpreted

Written – open

Examples: display notices; instruction sheets; system documentation; reports, minutes or newsletters

Advantages: sends consistent messages; provides a record; reaches a wide audience

Disadvantages: no opportunity for response; impersonal; cannot be sure message is read; production time and costs involved

Written – targeted

Examples: memos, letters

Advantages: can be carefully worded; is direct; allows for confidentiality; is a clear record

Disadvantages: too formal and impersonal; does not encourage discussions

Presentation

Examples: exhibitions, public address

Advantages: visual as well as verbal; captures interest

Disadvantages: one-way communication only; not always correctly interpreted; no clear record; uncertain whether message is accepted by all parties

The following table shows a range of communication methods appropriate to the intended audience and purpose.

Information	Audience	Purpose	Method
Production figures	Senior management, board of directors	To meet reporting requirements	Written report with spreadsheets and comments; a verbal report at a meeting
Information about company history, products and services, policies, personnel	New staff	To induct new staff members	Face-to-face contact, folio of information, group presentations
Details of new work requirements	Team members	To inform and train	Memo, email, group meeting
Warning about workplace safety	Staff members and visitors to the premises	To encourage safe workplace practices	Notices, emails, discussion at a team meeting
Promotion of product features and prices	New and existing customers	To generate sales	Brochures, new webpage, marketing letters
Performance review	Team members	Performance management	Written notes, face-to-face discussions, negotiation
Examples of customer service charters from other companies	Team members and colleagues	To compare customer service and make improvements	Circulation of material, invitation for comment, group meetings
Customer feedback	Team members and management	To plan for quality improvements	Preparation of summary report, brainstorming sessions
Sales presentation	Customers	To convince customer to buy your product	Face-to-face meeting, practical demonstration of product

Prepare your position

A position is what you plan to prove or explain.

When communicating to influence, you need to have identified the position you want to convince others to adopt. Your position needs to be supported by factual information and persuasive arguments that your audience are likely to respond to. To be convincing, it is important to know who your audience is and what strategies they are likely to respond to.

For example, if you're trying to upgrade your customers to a newer version of your product, you need to determine their current satisfaction with your product and focus on how the new product will improve their life. Your position might be: Product Y has all the features you love about product X, but offers seamless integration across more systems and produces results up to 10X faster. You will then need to convince your audience of the validity of that statement by providing examples, supporting data and testimonials.

Ensure your position can be expressed clearly as a simple statement. The detail comes in the supporting arguments you used to persuade others to adopt your position.

Example

Taking a position

Kane is asked to speak at a local network meeting about how his organisation is responding to the growing demand for locally produced goods. Kane has attended several network meetings before and knows the audience will be comprised of competitors and suppliers.

Kane's organisation has been considering the issue and has found that locally produced items are more expensive; if the switch to these goods were made, customers might not be willing to pay the higher price. However, some customers are already leaving, so management has decided to trial some locally produced items alongside the current product range.

After discussion with his senior management team, Kane decides to take a cautious position at the network meeting. He intends to present a neutral perspective of the situation and outline the general advantages and disadvantages of stocking locally produced goods, without revealing the company's plans.

Practice Task 1

Question 1

Which of the following is not an example of strategies you would use when planning cross-cultural communication? Tick all that apply.

- ◯ Learn about cultural differences in communication, body language, male/female interactions and terminology.
- ◯ Use written communication to avoid confusion or misunderstanding.
- ◯ Respect religious or spiritual beliefs that audience members hold, that may affect their participation in the presentation, and accommodate these sensitively.
- ◯ Avoid colloquial words and phrases that may cause confusion.
- ◯ Model behaviour and attitudes that promote culturally inclusive work practices.
- ◯ Avoid cultural stereotypes in your language and in any anecdotes, humour and support materials that you use.

Question 2

Draw a line to match each audience with their specific needs.

» Senior management, board of directors	» Need information that avoids cultural stereotypes and uses workplace examples of women in non-traditional roles
» New female staff members	» Need information delivered in 'attention-grabbing' ways, often using interactivity. Information should be easily accessible across various platforms
» Younger team members	» Need the use of specialist equipment and adaptive technology
» Existing customers with physical disabilities	» Need high-level detail in order to be able to make key decisions

Question 3

Why is it important to understand the needs of your audience and the purpose of your communication when preparing your position?

1B Confirm organisational policies and procedures for communication

When speaking on behalf of your organisation, you need to ensure you are communicating in accordance with organisational policies.

Any communication you undertake with external stakeholders is carried out as a representative of your organisation. By asking you to undertake external communication, your organisation is trusting you to behave professionally and communicate in accordance with organisational guidelines and policies.

Organisational policies and procedures

When communicating, you need to ensure that you act in accordance with the organisation's policies and procedures. There may be several policies and procedures that relate to the communication you are planning. Examples of these include:

- code of conduct
- confidentiality
- privacy
- social media use.

Policies

Policies set out specific guidelines or rules that tell staff how to work according to the organisation's objectives.

Procedures

Procedures put the organisation's policies into practice by setting out the way work is done, step by step. They are used to control work processes, allocate responsibilities for each task and ensure that requirements are met. Procedures include:

- standard operating procedures
- safety data sheets (SDSs)
- organisational activities undertaken to meet performance outcomes
- a set of accepted actions approved by the organisation.

Code of conduct

Every organisation has a code of conduct that employees are required to abide by as part of their employment contract. The code of conduct outlines how employees are expected to behave when carrying out their work and will cover a variety of topics relevant to the organisation. The following table highlights some elements that may be included in a code of conduct and are relevant to communication.

Topic	Example statement
Public comment	An employee may not make statements or comments to the media or other external bodies, regarding the organisation, its business dealings, financial status, clients or competitors unless directed or authorised to do so by the Chief Executive Director. Public comment by any employee should not imply that the comment, although made in a private capacity, is in some way an official comment of the organisation.
Intellectual property	All work, including ideas, concepts, creations and inventions, or other intellectual property rights produced by an employee in the course of their employment, is the property of the organisation. The organisation is entitled to any copyright or intellectual property rights from such work.
Confidentiality	Over the course of employment with the organisation, employees may be exposed to confidential information regarding the organisation, its customers, its suppliers and its employees. Employees are expected to keep any such information confidential. It is important to note that the obligations relating to confidentiality will remain in force throughout an employee's employment and after the termination of their employment. These obligations extend to and cover all operations and functions of the organisation.
Privacy	A privacy policy sets out the organisation's guidelines for collecting, using, disclosing and securing personal information. The policy adopts all requirements outlined in the *Privacy Act 1988* (Cth) and the Australian Privacy Principles. The organisation will only collect personal information where the information is necessary to perform its business activities. Information collected by the organisation will only be disclosed to a third party if consent has been obtained from the individual and in accordance with the *Privacy Act 1988* (Cth).

Confidential ideas and information

Workplace policies and procedures relating to confidentiality and privacy are influenced by state, territory and federal legislation. It is important to stay up-to-date with relevant policies to ensure you are behaving ethically and legally.

When communicating, you need to be aware of any confidentiality or privacy issues affecting staff and external customers when reviewing or handling information. Some ideas and information may be viewed as commercially or politically sensitive.

Confidential information can concern technology, business, finance, transactions or affairs of a third party. This includes information that is commercially valuable, such as trade secrets or business information, as well as personal information that may harm the interests of the third party if it is disclosed. An employee is also likely to generate confidential information.

Confidential information includes, but is not limited to:

- documents
- plans
- ideas
- accounts
- data
- reports
- client information
- decisions
- information about employees
- strategies
- recommendations
- policies and procedures
- budget and financial information.

If you are unsure about how to handle particular information:

- refer to your organisation's policies and procedures
- seek advice from a more senior or experienced work colleague
- comply with all Commonwealth, state or territory privacy legislation
- make judgments about when to release certain information
- if appropriate, share information in a memo, notice or announcements at a staff meeting.

Privacy Act 1988

If your organisation collects information about customers or clients, its operations come under the auspices of this Act. The Act deems personal information about individuals to be sensitive, such as information about:

- criminal record
- health
- membership of a professional or trade association
- membership of a trade union
- political affiliation or opinion
- racial or ethnic origin
- religious affiliation or belief
- sexual orientation or practices.

This information about a person could be used by others to discriminate against them or to identify them. Your organisation should inform you of your responsibilities regarding your customers' privacy. It should also inform you of its responsibilities with regard to your privacy. It is always advisable to consider any information provided to you about any individual confidential.

People generally have a right to see and correct, if necessary, files of personal information kept about them by organisations. Individuals are usually only denied access to files about them if their own or another person's safety is at risk, or if there are other legalities involved.

Commonwealth, state and territory privacy legislation governs the use of personal or client information. To read more about privacy standards, visit: aspirelr.link/oaic

Authority to communicate externally

You must determine if you need authority to communicate with external stakeholders.

It is likely that most employees within an organisation will communicate with external stakeholders as part of their role. Your authority to communicate may be explicitly stated in your job description or provided via verbal instructions from your manager. Organisations have policies regarding external communications for various reasons that are relevant to the way they do business. Here are some examples:

- Only sales consultants and the customer service team are allowed to speak with customers to ensure the customer relationship is carefully managed.
- No staff member is granted permission to talk to the media without expressed consent from the CEO. Any public statements must be released directly from the CEO.

- The names of suppliers, product specifications and costs should never be shared with customers or anyone external to the organisation without permission from a department head.

The following table outlines some of the external stakeholders that may be relevant to your organisation, their needs and who in the organisation is likely to communicate with them. You will need to determine if you have the authority to communicate with them and present material on behalf of your organisation.

External stakeholder	Needs
Current customers/ clients	Every organisation wants current customers to be repeat customers, so good customer service is essential to meet customer needs. There are likely to be specific people in your organisation trained to best meet customer needs and your customer may feel more comfortable dealing with their normal consultant or contact.
Potential customers/ clients	Potential customers want information on your product and service and why it will benefit them. This audience may be best handled by customer service, sales consultants and/or business development teams.
Government agencies	Communication with government agencies may occur for a number of reasons. Your accountant may be dealing with ATO, your sales team may have submitted a tender for a government contract, your production team may have applied for an export license. These agencies are likely to have very specific needs to be met and these will need to be dealt with by the appropriate person who has the knowledge and authority to communicate with them.
News media	In the event that your organisation is deemed newsworthy, you may be contacted by the media for information or a statement. Your code of conduct normally has explicit guidelines for talking to the media, so queries such as this should always be passed directly to your CEO or MD. There may be a sense of urgency from the media for a statement, but do not be pressured into providing information without permission.
Current suppliers	Your organisation is likely to deal with multiple suppliers, from your internet provider to wholesalers of products and parts. Each department in your organisation will have supplier relationships and there should be policies and procedures in place that outline how these relationships are handled and who should communicate with them. The suppliers will be keen to maintain and grow their relationship with your organisation, so these relationships need to be handled appropriately and according to your code of conduct.
Prospective suppliers	Your organisation may be approached frequently by potential suppliers who want to offer their services and products. They are keen to get your business but there are likely to be policies and procedures in place when it comes to considering new suppliers. If you directly handle a supplier relationship, you should confirm you have authority to consider an alternative supplier relationship and understand what information you are able to share with them.

External stakeholder	Needs
Competitors	Some employees of your organisation are likely to mix with competitors at conferences and events. Competitors may try to obtain information from you in regard to sales trends, new products etc. It is important not to discuss anything that is not publicly known outside the organisation.

Example

Communicating information

Melissa works as a customer service officer for an organisation that produces curtains and blinds. Melissa's role is primarily to answer customer calls and arrange for a consultant to visit to provide a measure and quote. She can provide product information but cannot provide pricing, although she has access to this information. Melissa takes a call from a potential customer who wants to know how much a set of blinds would cost. Melissa explains that she would need to arrange for a consultant to visit to measure and provide an accurate quote. The caller states that she has her measurements, and can't a quote just be provided? Melissa knows that only the sales consultants can provide quotes. She explains that it is not company policy to provide quotes on supplied measurements but offers to transfer the caller to one of the sales consultants. The caller then becomes cross and mentions that a competitor will provide this information. Melissa believes this is untrue but does not correct the caller. Again, she offers to transfer the caller to a sales consultant and the caller refuses and hangs up. Melissa makes a note of the caller's number and sends an email to her manager to let her know about caller's claim. Her manager responds and tells Melissa that this will be investigated.

Practice Task 2

Question 1

How can you confirm your authority to present information on behalf of your organisation? Tick all that apply.

- ◯ Job description
- ◯ Informal discussion you have with your mentor over lunch
- ◯ Verbal instructions provided by your manager
- ◯ Discussion with a team member
- ◯ WHS policies and procedures

Question 2

Which of the following information may be subject to confidentiality?
Tick all that apply.

- ◯ Reports and recommendations
- ◯ Product sale prices
- ◯ Client information
- ◯ Information about employees
- ◯ ABN and ACN
- ◯ Accounts, budget and financial information

Question 3

What are three ways you can manage confidential information appropriately when contacted by an external channel, such as a government agency?

Summary

- In order to communicate with influence, you need a clear understanding of the audience's needs and what communication strategies they are likely to respond to.
- The information needs of an audience are dependent on a number of factors, including age, culture, education and experience.
- Ensure your position statement is clear and aligns with the purpose of your communication.
- When communicating with external stakeholders, you are representing your organisation and must behave in a way that upholds their values and code of conduct.
- Your organisation is likely to have a number of policies that relate to confidentiality and privacy, especially when communicating with external stakeholders.
- It is essential that you confirm that you have authority to present material on behalf of your organisation and that you communicate according to organisational policies.

Learning Checkpoint 1

Identify communication requirements

Part A

1. Which of the following actions will help you determine the needs of an external audience? Tick all that apply.

   - ◯ Research the audience you will be communicating with, including their backgrounds.
   - ◯ Send an email to your manager asking for details of the meeting venue.
   - ◯ Determine if the audience has any specific requirements when arranging a meeting or presentation.
   - ◯ Organise IT support to ensure projectors and telecommunication equipment are operational.
   - ◯ Use business networking sites such as LinkedIn to find out more about the attendees and their experience and background.

2. Draw a line to match each position statement to the correct purpose of communication.

» Resignation of a staff member	» Our new product has all the specifications you loved with the original but it now 5x faster with 20GB of memory.
» Merger of two teams	» The company has invested in the latest CRM system. Teams from customer service and administration will begin training on Monday for full implementation within a fortnight.
» The release of a new product	» We are pleased to announce that one of our talented customer service representatives will now be the manager of the new wholesale customer service division.
» The introduction of a new software system	» Sadly, one of our team members will be leaving us to take advantage of an exciting opportunity.
» The release of an upgraded product	» From Monday, the customer service and administration teams are joining together to pool their great skills and experience.
» Promotion of a staff member	» Our amazing new product was released today and is now available for ordering.

3. List three strategies you would use to communicate with an audience of mixed ages, cultures and language.

Part B

Read the case study and then answer the following questions.

Case study

Lyra is an accountant. Her organisation sends her off to undertake professional development on the new update to their financial software package. Lyra arrives, signs-in and realises that there are a number of people present from her organisation's competitors. At break time, Lyra is chatting to some participants when one starts talking about a tender that they are all bidding for. They ask her if she's involved in her organisation's bid. Lyra does not have the authority to discuss business matters with anyone outside her organisation. This was made clear to her on employment and through various organisational policies and procedures.

1. What organisational policies should guide Lyra's behaviour in this situation?

2. What would be an appropriate and professional response from Lyra?

3. If Lyra was approached by one of the participants and asked if she thought her organisation would consider a joint application for the tender, how should she reply?

Topic 2 | Negotiate to achieve agreed outcomes

2A Identify objectives and issues

2B Prepare position and supporting arguments

2C Participate in negotiation and confirm outcomes

2A Identify objectives and issues

The purpose of negotiation is to reach an agreement. To do this, participants must understand the objectives they want to achieve and the possible issues that may get in the way.

Negotiating requires elements of give and take. Managers should aim to create a courteous and constructive interaction that is a win-win for both parties. A successful negotiation is one in which a party makes concessions that mean little to them, while offering something to the other party that means a lot to them. A manager's approach to negotiation should foster goodwill, regardless of the differences in party interests.

Before entering into negotiations, you should determine the needs and requirements, negotiation strategy and time frames, with the aim of leaving each party satisfied and ready to do business with each other again.

Identifying objectives

To effectively negotiate with other parties, you will need to have a clear understanding of your objectives, your organisation's objectives, and those of the other parties.

Negotiations can occur on small and large scales. You may need to negotiate time off with your manager or negotiate a merger or acquisition. However, the principles of negotiation are still the same and the key to a successful negotiation is to understand your objectives and those of your stakeholders (the party you are negotiating with).

If you are negotiating on behalf of your organisation, you need to meet with all of your organisation's stakeholders to decide on the most important issues and requirements. They may identify a list of needs and these will need to be ordered to ensure it's clear what are essential needs and what are nice to have.

To clearly define your objective, you should answer the following questions:

- What is it you want (your goal)?
- What is it you must have?
- What is it you need?
- What are you prepared to do to achieve your objective?
- What are you not prepared to do to achieve your objective?

Applying these questions to a request for time off scenario could look like this:

> *I want to finish work at 3pm each day. I must be able to pick up my children from school on Fridays. I need to spend more time with my children. I am willing to start earlier and take a shorter lunch break. I am not willing to take a pay cut or change jobs.*

You also need to consider the questions from the perspective of the party you are negotiating with. Consult with your stakeholders for their thoughts, research the organisation and the representatives you will be negotiating with, just as you would to identify their needs as your audience.

Using the same scenario, consider the same questions from the perspective of your manager or employer. Their answers may look something like this:

> *I want my employee to fulfil their role and responsibilities. My employee must be present at work between 9:30-2:30 to attend core meetings. I need reliable employees who are good at their job and can be trusted. I'm prepared to offer flexibility to employees who are highly competent. I am not prepared to let flexible working impact on other team members, team output or team objectives.*

To help you plan your negotiation and identify outcomes, the following table may assist you:

Question	Your organisation	Other party
What do you want?		
What must you have?		
What are your needs?		
What are you prepared to do to reach an agreement?		
What aren't you prepared to do to reach an agreement?		
What will happen if an agreement isn't reached?		
What prevents you from meeting the other parties' needs?		

Identifying issues

Once you have identified the objectives of both parties, you can consider where conflicts are likely to arise and what problems or issues they may cause.

Understanding where conflicts or barriers exist to achieving a successful outcome for both parties is an essential part of negotiation planning. It helps you to understand if your position is realistic and whether it will be possible to reach an agreement. If you have used a table similar to the one above, this will help you identify where you are likely to find barriers to agreement. You could add another column onto the table to capture these conflicts and you may want to consider asking some of the following questions to better identify problems and issues:

- What is the other party's position on the issue likely to be?
- How does their position differ to yours?
- Does your position offer value to them?
- Are there any legacy issues between your organisation and the other party that may create problems?
- What arguments are most likely to be effective during the negotiation?

Overarching the negotiation is the requirement to meet the organisation's policies and procedures. It's important that you consult with your organisation's stakeholders when identifying issues and document them all. However, you must work within the privacy and confidentiality boundaries when asking for information and sharing this information with others. Several human resources policies exist in relation to resolving conflict, each with a set of procedures that must be followed, including timelines for complaints and ways to escalate issues if they are not resolved. These documents need to be made available to staff so the process is clear and evident.

Once you have consulted, you can look at how issues can be overcome or signal issues that may prevent the negotiation from being successful. This will also help your stakeholders focus on how important the desired outcome is and what they may be willing to accept.

No amount of planning or preparation is too much when approaching complex or high-risk negotiations. Take the time to plan your approach to the subject under negotiation by:

- clearly setting out your objectives, including your minimum acceptable outcome, anticipated outcome and ideal outcome
- determining what you will do if the negotiation fails
- determining your needs, the needs of the other party, and the reasons behind them
- listing, ranking and valuing your issues and then considering the concessions you might make

- analysing the other party and assessing their objectives and the information they require
- researching the market and consulting with colleagues, supervisors and managers about the subject under negotiation and the other party.

Example

Identifying objectives

Hideo is leading the negotiations for the purchase of new equipment for their warehouse. He meets with his internal stakeholders to discuss their objectives, which relate to budget, reliability of equipment and the cost of servicing and maintaining equipment. They also consider the objectives of their intended supplier. The sales price is outside their budget and Hideo is immediately told by one stakeholder to find a cheaper supplier. However, Hideo has researched other suppliers and has found that their machinery is not as reliable and has much more expensive servicing and maintenance costs. Hideo has found by talking to others in his network that the preferred supplier doesn't budge on price. However, Hideo suggests that his organisation needs to consider the longer term and decide if they can afford to spend more now in exchange for reduced servicing and maintenance costs. He also suggests that they could propose an agreement to their preferred supplier for a reduced sales price and higher maintenance and serving costs and see how they respond. Hideo's stakeholders agree.

Practice Task 3

Question 1

Draw a line to match the needs of stakeholders with their negotiation objective.

» Mona wants to be able to pick up her daughter from school each day	» I want a pay rise. I need to start saving more money. I am willing to take on more responsibilities, including managing team projects. I am not willing to work weekends.
» Patrick wants to purchase a larger home for his family but it is out of his current budget	» I want to take 4 weeks of leave. I need to recharge and recover after a very busy year. I am willing to select a date that works with the company. I am not willing to wait more than 4 months.
» Carl is feeling stressed and needs a holiday	» I want to finish work at 3pm each day. I need to spend more time at home. I am willing to start earlier and take a shorter lunch break. I am not willing to take a pay cut or change jobs.

Question 2

Which of the following strategies can be used to identify and document potential negotiation issues? Tick all that apply.

- ◯ Clearly establish your objectives, including your minimum acceptable outcome, anticipated outcome and ideal outcome.
- ◯ Determine what you will do if the negotiation fails.
- ◯ Determine your needs only and the reasons behind them.
- ◯ List, rank and value your issues and then consider the concessions you might make.
- ◯ Research the market and consult with colleagues, supervisors and managers about the subject under negotiation and the other party.

2B Prepare position and supporting arguments

You must gather evidence to write and support your position statement.

A substantiated idea is one backed up or supported with evidence. Develop a substantiated position after researching and improving your understanding of the topic. Gather persuasive information from a range of sources to help you justify your position to the audience.

Before you present an idea to others, decide why you believe it is an idea worth sharing. If you want someone to support your cause, accept your concept or follow your process, you need to back up your position and deter others from theirs.

Substantiated positions may be:
▪ grounded in appropriate research ▪ the result of rational and logical thought ▪ subjected to the analysis of others through peer review ▪ supported by relevant evidence.

Gather evidence

When you present your position on ideas, it will only be convincing if you use evidence to support your argument.

There are many different kinds of evidence you can use. Always choose types of evidence that are appropriate for your particular audience and relevant to your argument.

The following table shows some of the aspects to consider when gathering evidence.

Aspect to consider	Some possibilities	Examples
Where does the evidence come from?	▪ Personal experience ▪ The experience of others	▪ Your own reflections and opinions ▪ Testimonials and opinions of others ▪ Feedback received from existing users or customers, such as surveys
What format is it in?	▪ Print ▪ Online ▪ Verbal	▪ Academic and general publications ▪ Internet research ▪ Social media research ▪ Conversations ▪ Interviews ▪ Meetings

Aspect to consider	Some possibilities	Examples
What is its purpose?	▪ Academic ▪ Non-academic	▪ Textbooks ▪ Journal articles ▪ Research papers ▪ News media ▪ Magazines ▪ Online articles
What is the source?	▪ Primary sources ▪ Secondary sources	▪ Creative works ▪ Statistical data ▪ Eyewitness accounts ▪ Results of experiments ▪ Video recordings ▪ Sources presenting facts or descriptions about events that were not directly observed ▪ Scholarly books and articles

Adapted from: First Year Experience Series @ 2000 Learning Centre, University of Sydney

Write your positioning statement

Your position is your starting point for presenting a convincing case during your negotiation and is usually expressed in the form of a positioning statement.

You may find that your position in any argument depends largely on the amount of evidence available to support it.

Once you have done enough research on an idea:

- determine the range of positions put forward by others
- make judgments about which ones are the most valid
- decide your own position and write a positioning statement.

Make your positioning statement meaningful and convincing.

To be effective, the wording of your positioning statement must contain:

- your objective
- the frame of reference
- reasons to believe in your objective.

Things to keep in mind when writing your positioning statement:
▪ Keep it simple and tailored to your audience. ▪ Make your idea sound credible, i.e. that you can deliver on your promise. ▪ Consider whether your position is consistent with decisions already made by the other party. ▪ Give your position room for growth.

Develop your argument

Once you have defined your position, you need to develop an argument using the evidence gathered to support it.

Don't just summarise the evidence you have gathered; use it to back up your position and develop your argument.

When developing your argument, keep the following things in mind:

- Base your argument on a logical structure in order to be persuasive.
- Try using a sequence of points that describe your own way of seeing the topic.
- Choose key messages that are useful to support your position.
- Show the inadequacies of other ideas that contradict your position.

You can prepare your argument by following these steps.

1. Identify your position

If you haven't already done so, write a positioning statement that clearly identifies what you are arguing, or the point you are trying to prove.

2. Know the main points in your argument

Break down your argument into steps. Focus on several different things that led you to deciding on your final position.

3. Structure your argument

Link the points in your argument by discussing them in a logical order, and drawing connections between them wherever possible.

4. Use evidence

To argue convincingly, draw on the evidence you have gathered to support each of your points. Without evidence, all you have is an unsupported claim.

5. Consider counter-arguments

Consider the possible counter-arguments. This allows you to address potential objections before they are raised.

6. Have a clear conclusion

Show how your position is supported by the evidence you have presented. Don't just summarise your argument. Instead, try to explain how each point works with the others to contribute to your argument as a whole.

Example

Preparing position and supporting argument

Troy is preparing to negotiate with a venue for their organisation's Christmas party. He has a detailed quote from the venue and knows it is outside of their budget. However, Troy prepares his position, which asks for a 15 per cent reduction in the rate. He supports his position with arguments that his organisation won't require some of the services included in the quote and proposes a reduced menu. He also plans to mention that a successful event will ensure the venue is considered to host their national conference next year.

Practice Task 4

Question 1

Answer 'Yes' or 'No' to the following comments about position statements.

a) Position statements should be tailored to the needs of the audience.	» Yes	» No
b) Position statements are the most powerful when supported by evidence.	» Yes	» No
c) Position statements should only be arrived at after logical and rational thought.	» Yes	» No
d) Eyewitness accounts, statistics and experimental data are the only useful sources to use when developing a position description.	» Yes	» No

Question 2

List two reasons why evidence is needed to support your argument.

2C Participate in negotiation and confirm outcomes

Communication is key to negotiating a successful outcome and good communication is required throughout the process.

The last part of planning your negotiation is communicating with your stakeholders to agree on a time and place to meet. The tone of the meeting may be dictated by the chosen venue so it may be helpful to choose a neutral and mutually convenient location to create a level playing field. For example, one party might create the perception of power if the meeting was held in their offices where they are most comfortable. Therefore, the location and time of the meeting may also need to be negotiated.

Other factors to consider when organising the meeting are listed below.

- Ensure you establish the duration of the meeting and who will be attending.
- Check to see if the attendees have any special requirements and if they need equipment or will be bringing their own.
- Draft an agenda for agreement by all stakeholders before formally sending it out.
- Consider the need for refreshments and any dietary requirements.

Careful planning and good communication will set the scene for successful negotiations.

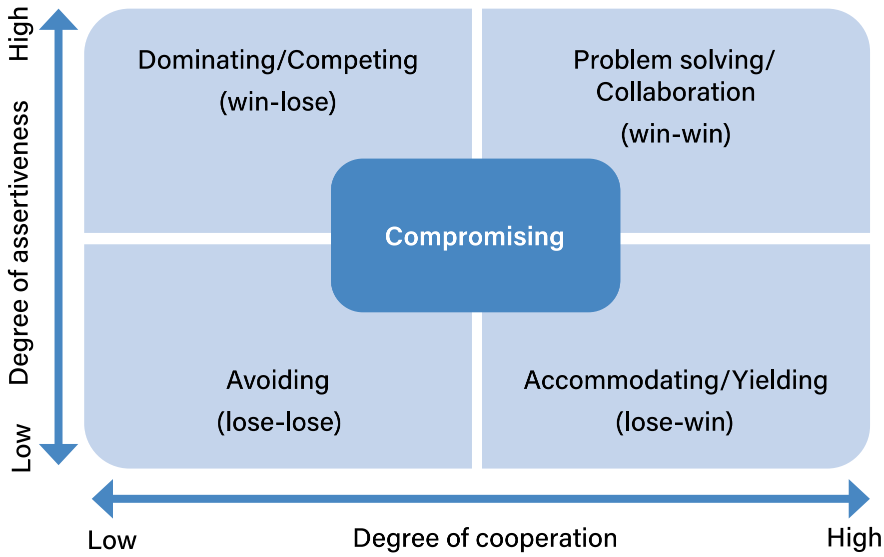
Negotiation strategies

Negotiation strategies need to match the situation and identified problem.

Serious or sensitive situations will require tact and prudence and may involve third parties. Situations of a more trivial nature may involve a short discussion between two individuals.

Understanding the other party's interests and tactics is integral to good negotiating. Selecting a strategy that best responds to their interests and tactics will help you to achieve the best outcome.

Negotiation strategies should be matched to the situation. The strategy selected will depend on who you are negotiating with and the type of relationship you have with them. For example, identifying the level of cooperation and common interests that exist between the parties, and how each party will behave during the negotiation, will also depend on what is being negotiated, and the time frame and setting in which negotiations are expected to take place.



Negotiation strategies	
Problem-solving/ collaboration i.e. win–win	Win-win strategies result in situations where both parties are satisfied with the settlement negotiated. Each party commits to examining and discussing issues closely when entering into long-term agreements that warrant careful examination.
Dominating/ competing i.e. win–lose	Win-lose strategies result in situations in which one party is satisfied and one is dissatisfied. It focuses on the resolution of one party's issue to the exclusion of others, until one side is defeated. It involved persuading your negotiating party to concede to your outcome if you are bargaining in one-off negotiations over major 'wins'.
Accommodating/ yielding i.e. lose–win	Lose-win strategies result in situations in which one party is dissatisfied and the other is satisfied. One party withdraws or makes a number of concessions while the other party wins. Conceding a point that is not vital to you but is important to the other party is valuable in ongoing negotiations.
Avoiding i.e. lose–lose	Lose-lose strategies result in situations where the objectives of both parties are too rigid, or when both parties are unable to compromise or problem-solve, or are unaware of the opportunity to do so. Both parties forgo their idea outcomes, settling for an outcome that is moderately satisfying to each participant.
Compromising	A compromising negotiation style is a form of bargaining. Compromisers split the agreement's value between the two parties versus finding a solution, so that everyone benefits from an agreement's full value.

Negotiation approaches

As well as selecting a strategy, managers and workplace relations professionals should consider how they will approach the issue being negotiated.

There are three key approaches to negotiations: hard, soft and principled negotiation. Many experts consider the third option – principled – to be best practice.

Negotiation approaches are described below.

Hard

The hard approach
The hard approach involves contending by using extremely competitive bargaining techniques.

Soft

The soft approach
The soft approach involves yielding, where one party tries hard to meet the interests of the other party and forgoes their own interests.

Principled

Principled negotiation
Principled negotiation focuses on achieving a lasting, win–win outcome by separating the people from the issue, focusing on interests (not positions), generating a variety of options before settling on an agreement, and basing the agreement on objective criteria.

Negotiation process

To get the best outcomes, managers need to understand the steps involved in the negotiation process.

Every time managers or workplace relations professionals negotiate, they have to make choices that affect whether a successful outcome will be achieved for their organisation.

While many negotiations are straightforward, there will be some that are challenging. Success will depend on careful planning and preparation. Negotiations should always be approached with a clear set of strategies, messages and tactics that guide the manager from planning to closing.

Discuss

Your intention is to establish common ground before moving into areas of difference.

In engaging with the other party during the negotiation:

- introduce yourself and articulate the agenda
- demonstrate calm confidence
- remember your objectives and confirm the objectives and feelings of the other party
- use active listening skills to identify areas of agreement and aim to build rapport with the other party
- discuss concepts and ideas.

Propose

Specifically define the issues you wish to resolve. Link issues to the other party's objectives and focus on interests rather than positions.

Give and take by:

- proposing your first offer and listening to the proposals made by the other party (do not accept the first offer unless it satisfies your interests)
- checking your understanding of the other party's proposal
- paraphrasing the other party's suggestions to summarise the content, ideas and feelings being communicated.

Negotiate

Begin by asking for what you want, but accept that your objectives might have to be modified. Aim to collaborate with the other party in order to produce a solution that satisfies both parties.

Negotiate by:

- considering concessions, then making and seeking concessions
- suggesting alternative proposals and listening to offered suggestions
- summarise points throughout the discussion to confirm understanding
- take the time to agree on what you have negotiated so far.

Close

Take a moment to revisit your objectives for the negotiation. Once you feel you are approaching an outcome that is acceptable to you:

- look for closing signals, such as fading counter-arguments, tired body language from the other party, or negotiating positions converging
- articulate agreements and concessions already made
- make closing statements
- put agreements in writing as soon as possible
- follow up promptly on any commitments you have made.

Example

Negotiating

Tina and Helena are meeting to negotiate time frames for a product delivery and launch. Tina wants more time to ensure the product is the highest quality, while Helena wants the product available earlier to ensure her sales team can make the most of the key selling period and maximise their sales. Ultimately, both Tina and Helena want the product to be successful. Tina knows that if it's not out at the right time, their customers may buy an alternative product. Helena knows that if the product is rushed, there may be quality issues and that will affect sales and the company's reputation. So both attend the meeting with their ideal dates in mind, but are prepared to compromise. Tina and Helena both talk through their ideal timelines and then look for ways to have their needs met, even though their dates are too far apart. As a compromise, Tina suggests that she could investigate the cost of having more prototype products produced to bring forward the product launch date and provides examples of how other organisations use a similar strategy. Helena is enthusiastic about that idea because it would allow for an earlier product launch than she had hoped and she could contribute some of her marketing budget towards the cost of the additional prototypes. Tina agrees to investigate costs and prepare a proposal for Helena to contribute to which would need to be approved by their CEO. Both are pleased that they have been able to find a way to work together to achieve a successful product launch and Helena captures their agreed actions in an email following their meeting.

Other conflict management techniques

Negotiation is only one type of conflict management technique; there are various others.

In your workplace, you are likely to encounter conflicts regularly. Managers should know how to turn conflict into opportunities for growth, progress and improved organisational performance. There is a range of skills and techniques that can be used to manage workplace conflict in a way that achieves positive outcomes for the parties and benefits the organisation overall.

Some techniques for managing conflict are listed below.

Conflict management techniques
▪ Communication ▪ Mediation ▪ Negotiation

Conflict resolution strategies

When conflict arises in the workplace, it is important to address these issues before they begin to affect productivity, performance or staff wellbeing.

Workplace conflict can occur for a variety of reasons, including:

- personality clashes within the team
- conflict between employees and the boss
- disagreement over business decisions, actions or ideas.

Regardless of the nature of the dispute, any cases of workplace conflict must be resolved as quickly as possible so as not to negatively affect others, including clients, customers, workmates or observers. This demonstrates effective leadership, gains the trust and respect of those around you and ensures the time and space required to resolve the conflict properly. In the 1970s, Kenneth Thomas and Ralph Kilmann identified five main styles of dealing with conflict. They argued that people typically have a preferred conflict resolution style. They also noted that different styles were most useful in different situations. Read each of the conflict resolution styles shown here and consider how you might adjust your current approach.

Competitive

People who use a competitive style take a firm stand, and know what they want. They usually operate from a position of power, drawn from things like position, rank, expertise or persuasive ability. If used consistently, it can leave people feeling bruised, unsatisfied and resentful.

Use this approach when:

- the decision needs to be made fast
- the decision is unpopular
- resisting someone who is trying to exploit the situation selfishly.

Collaborative

People tending towards a collaborative style try to meet the needs of all people involved. These people can be highly assertive but, unlike the competitor, they cooperate effectively and acknowledge that everyone is important.

Use this approach when:

- you require a variety of viewpoints to get the best solution
- there have been previous conflicts in the group
- the situation is too important for a simple trade-off.

Compromising

People who prefer a compromising style try to find a solution that will at least partially satisfy everyone. Everyone is expected to give up something and the compromiser also expects to relinquish something.

Use this approach when:

- the cost of conflict is higher than the cost of losing ground
- opponents of equal strength are at a standstill and a deadline is looming.

Accommodating

This style indicates a willingness to meet the needs of others at the expense of the person's own needs. The accommodator often knows when to give in to others, but can be persuaded to surrender a position even when it is not warranted.

Use this approach when:

- the issues matter more to the other party
- peace is more valuable than winning
- you want to be in a position to collect on this 'favour' you gave.

Avoiding

People tending towards this style seek to evade the conflict entirely. This style is typified by delegating controversial decisions, accepting default decisions, and not wanting to hurt anyone's feelings.

Use this approach when:

- the controversy is trivial
- someone else is in a better position to solve the problem.

Conflict should be dealt with sensitively and quickly to de-escalate the situation. However, suppress any tendency to use your authority to make a unilateral decision too quickly or to interfere in a situation that should be resolved between the individuals concerned. Follow problem-solving steps to investigate the issue, determine whether or not you should take action and define your options for rectifying the situation. Your organisation is likely to have set procedures for handling conflict.

Conflict resolution procedures may include:

- arranging a time for the relevant parties to meet to discuss the situation
- explaining the need for commitment and cooperation between team members in order to achieve common goals
- providing opportunities for resolution, such as brainstorming potential solutions
- explaining the organisation's processes if a resolution cannot be achieved.

De-escalation strategies

If there is a workplace conflict, there are a number of communication strategies that can be used to de-escalate the issue. Use your emotional intelligence to put yourself in another person's shoes, and practice empathy towards the parties involved. By making an effort to understand everyone's feelings and emotions, the key issue at hand can be uncovered and resolved. Ask questions to uncover not only what happened, but why and how. For instance, if someone becomes overly annoyed at a co-worker arriving 10 minutes late, is this due to a pattern of constant lateness and having to cover for them?

Active listening is another key strategy, so that people feel heard and that you are actively engaging with them. It is also important to speak respectfully, and to offer responses that build up, rather than tear down. Avoiding corporate speak is also key; you want to be personable and approachable, rather than distant 'management'.

Dispute resolution processes

Dispute resolution involves resolving disagreements by talking to the other people involved, getting help from an impartial third party or deciding whether you can live with the situation as is.

Management needs to take the initiative in developing collaborative processes for dispute resolution and encouraging all parties to use them – as opposed to the arduous route of relying on litigation or industrial action in every case. Consultation ensures workplace issues are dealt with as quickly and amicably as possible to the satisfaction of all parties.

Many organisations have a formal framework in place to help parties deal with issues that cannot be easily resolved. The ideal process for dispute resolution varies enormously depending on the size and nature of the organisation, but the following common principles apply.

Consensus

Dispute resolution procedures should be developed in collaboration with all interested parties. This is the best way of ensuring that management and staff alike trust the processes and are prepared to abide by them. The processes should reflect fair and thorough decision-making and sound people-management practices in accordance with the organisation's ethical standards.

Transparency

New employees should be introduced to dispute resolution through induction programs and literature made available when they join the organisation. The procedures should be part of the organisation's standard operating procedures, with details readily accessible to staff via the organisation's intranet, employment manuals, human resources officers and/or workplace representatives.

Functionality

There is little point in having a process that is so unwieldy no one is prepared to follow it. The procedures should be logical, easy to follow and as simple as possible.

Timeliness

This is vital in ensuring that problems are kept in check. A commitment to regular consultation with staff and openness to ideas being shared help to address issues as they arise – or to avoid them altogether. When a problem does emerge, follow the agreed set of actions as quickly and efficiently as possible.

Informality

Issues are best resolved at the lowest organisational level and as close to the workplace as possible, so they don't take on more meaning than necessary. Beyond that, there should be a tiered structure to be followed if the issue cannot be resolved informally.

Referral

Dispute resolution processes should allow for issues to be referred to other departments or personnel within the organisation if required.

Right of review

Internal procedures are not meant to replace the right of recourse to formal dispute resolution processes. Employees (and management) are entitled to retain access to mediation, industrial action, legal advice, arbitration or other forms of external intervention when deemed necessary.

Mediation

Workplace mediation is a form of workplace conflict resolution: a confidential process where an impartial and independent third person facilitates communication between two or more people in dispute.

The role of the mediator is to provide a structured process that helps both parties to the dispute to identify the issues, develop possible options and reach an agreement that satisfies and mutually benefits them both.

The purpose of workplace mediation is to empower people to take responsibility for the issues and the resolution, viewing the conflict in a broader context and from multiple perspectives. Managers and workplace relations professionals should be trained to mediate workplace conflict while maintaining positive working relationships between the people involved.

Mediation saves an organisation time and money and focuses on improving workplace relationships.

The issues that may be resolved using workplace mediation include:
▪ interpersonal conflict
▪ working and communication style differences
▪ leadership style differences
▪ management of grievances
▪ changing work practices
▪ changing job role and responsibilities
▪ employment terms and conditions
▪ employment termination conditions
▪ allegations of discrimination, bullying or harassment.

Confirm and document outcomes of negotiation

Once negotiations are completed, it is important to document outcomes and next steps.

Your negotiation should have closed with an agreement on next steps or actions both parties have agreed to take. It is important to confirm the outcome of the negotiation in writing and acknowledge the steps both parties have agreed to take in order to implement the outcome. Communications that are likely to occur after a negotiation may include:

- an email summarising what was agreed
- minutes of the negotiation meeting
- a draft contract or agreement.

You must ensure that you follow through on promises made in order to strengthen the relationship and to build trust.

Practice Task 5

Question 1

Draw a line to match the technique to the relevant problem-solving strategy

» Negotiation	» Uses an impartial and independent third person facilitates communication between two or more people in dispute.
» Mediation	» Listens to the concerns of all parties, acknowledges their opinions and emotions and puts the focus on future steps and how to move forward.
» Conflict resolution	» Establishes common ground between parties, proposes a solution and listens to the views of the other party, negotiates to achieve a win-win outcome and put agreement into writing as soon as possible
» Incident de-escalation	» Provides opportunities for resolution, such as brainstorming potential solutions, and establishes the need for commitment and cooperation between team members in order to achieve common goals

Question 2

What information should be documented following the close of negotiations?

Question 3

Which of the following actions can help you establish common ground with relevant stakeholders during negotiations?Tick all that apply.

- ◯ Introduce yourself and articulate the agenda.
- ◯ Demonstrate calm confidence.
- ◯ Introduce the mediator who will facilitate discussions.
- ◯ Remember your objectives and confirm the objectives and feelings of the other party.
- ◯ Use active listening skills to identify areas of agreement and aim to build rapport with the other party.

Summary

- Before entering into negotiations, you should determine the desired outcomes, negotiation strategy and time frames with the aim of leaving each party satisfied and ready to do business with each other again.
- You should meet with all of your organisation's stakeholders to decide on the most important issues and the desired outcomes.
- You also need to anticipate the desired outcomes and needs of the other party.
- Compare the desired outcomes and needs to identify where any issues or conflicts will arise.
- Determine a strategy for overcoming potential issues and problems.
- Your position statement should reflect your desired outcome.
- Supporting arguments are built by gathering evidence to reinforce your position.
- There are a number of negotiation strategies and approaches you can take, but ultimately you should aim for a situation where both parties have their desired outcomes met.
- Communicate clearly with the other party to set the scene for a successful negotiation.
- Prepare a plan for the negotiation and ensure your approach is methodical and consistent.
- Confirm and document outcomes of the negotiation soon after the meeting ends.
- Negotiation is just one technique that can be used to resolve conflict; it can be helpful to consider other techniques when trying to find solutions.

Learning Checkpoint 2

Negotiate to achieve agreed outcomes

Part A

1. Which of the following questions should you use to identify your objectives of negotiation? Tick all that apply.

   - ◯ What is it you want (your goal)?
   - ◯ What is preventing you from achieving your goal?
   - ◯ What is it you need?
   - ◯ What are you prepared to do to achieve your objective?
   - ◯ What are you not prepared to do to achieve your objective?

2. Answer 'Yes' or 'No' to the following statements about the desires and needs of stakeholders involved in negotiations.

a) A mediator is the only person who needs to consider the needs of all parties.	» Yes	» No
b) The main desire of all stakeholders in negotiations is to win at the expense of the other party.	» Yes	» No
c) The desires and needs of stakeholders will be in direct contrast to your own needs and goals.	» Yes	» No
d) The needs and desires of all stakeholders must be considered in order to prepare for negotiations.	» Yes	» No
e) By considering the needs of the other party, a win–win solution is much more probable.	» Yes	» No

3. Which of the following communication techniques will help you achieve common ground and the potential for compromise during negotiations? Tick all that apply.

   - ◯ Employ a soft negotiation approach.
   - ◯ Introduce yourself and articulate the agenda.
   - ◯ Demonstrate calm confidence.
   - ◯ Avoid eye contact so as not to intimidate.
   - ◯ Remember your objectives and confirm the objectives and feelings of the other party.

4. Put the following actions in order of how you would communicate during negotiations to achieve a win–win outcome.

   ◯ Propose your first offer and listen to the proposals made by the other party (do not accept the first offer unless it satisfies your interests).

   ◯ Ask for what you want, but accept that your objectives might have to be modified. Aim to collaborate with the other party in order to produce a solution that satisfies both parties.

   ◯ Look for closing signals, such as fading counter-arguments, tired body language from the other party, or negotiating positions converging.

   ◯ Establish common ground before moving into areas of difference.

Part B

Read the case study below and then answer the questions that follow.

Case study

You are the human resources manager for a publishing company. You have been managing employee performance reviews and collecting feedback from management and workers. After analysing the data, you feel that the company needs to invest in more professional development opportunities for middle management. You plan to raise this at the next management meeting. However, with budgets already stretched and priorities focused on marketing and social media presence, you are not feeling very confident.

1. What two problems or issues can you anticipate?

2. What would your position statement be when talking to management?

3. What three pieces of evidence could you gather to support your position?

4. What negotiation strategy would you choose and why?

5. Describe at least three steps you should take at the end of the negotiation.

Topic 3 | Participate in and lead meetings

3A Identify need and prepare for meeting

3B Conduct meeting

3A Identify need and prepare for meeting

Workplaces are busy environments and you may find some days are full of meetings, but are all meetings really necessary?

The number of meetings held in the workplace can be reflective of workplace culture. Some organisations feel that in order to make sure that staff have received the information they need, they must attend a meeting. Consider if you have ever been told that someone hasn't read an email you have sent. When that happens regularly, employees find themselves arranging more and more meetings just to ensure the information is disseminated and responses or decisions can be obtained. Many managers make the mistake of scheduling regular team and one-on-one meetings because they believe the simple act of holding the meeting will induce team bonding and information sharing.

However, meeting purposes may also be formalised or required by company protocols; for example, an annual general meeting of shareholders is dictated by the company's prospectus and company rules. There may also be government rules and regulations that must be adhered to.

Effective meetings have a definite and known purpose. Before you start scheduling meetings, it is a good idea to think about why the meeting needs to take place. The table below explains four reasons for holding meetings.

Motivate the team	While meetings are a great way to promote teamwork, think about what you are going to do in the meeting and what steps or activities will directly contribute to a sense of teamwork. One idea is to get team members to work together on deciding the agenda. Perhaps ask small groups within the team to organise an activity or lesson on a topic they feel would be of interest or benefit to them. Encourage team members to have a sense of ownership in the running of meetings and of the issues discussed, as this promotes interest in the agenda and team operations. Think about asking guest speakers, or ask team members to report successes and share specific issues with their colleagues. Meetings are an appropriate venue to reward or recognise excellent work.
Set goals	Planning meetings for setting goals is very important. Understand that this may take some time and that team members will want to debate these issues at length. Allocate plenty of time and consider taking meetings such as these out of the workplace, if possible. Record people's thoughts on a flip chart or whiteboard, ensure everyone gets a say and that all opinions and ideas are heard.

Solve problems	Make sure everyone has the information they need to contribute effectively and that they know their ideas, knowledge and opinions are welcome. This might mean organising information packs, emails or copying documents and distributing them before the meeting. You should start the meeting by briefly identifying the reason for it and then moving on to problem-solving or generating ideas. If people want to discuss other issues, make sure they have the opportunity to do this outside the problem-solving meeting by talking directly with you or placing the issue on the agenda of a more suitable meeting.
Provide training	Think about what you want your staff to learn. Is the meeting room the best place for the training? Do you need equipment or materials in order to conduct the training? Are you the best person to do the training or should you sit in on the session as a trainee? Do all team members need to attend? Make sure staff know it is a training session, why their attendance is important, what is expected of them, who will be there (including the facilitator) and how long the session will last.

Scheduling meetings

Meetings should be scheduled at times that are suitable to all attendees; this both demonstrates respect for all participants and communicates appreciation for their contributions and time.

If you decide to hold a meeting, you need to respect that the people you invite are busy and that the meeting time needs to be spent productively. Ideally, at the end of a meeting, everyone should leave feeling they have gained from the experience.

Before you schedule the meeting, ensure you have identified the purpose and objectives of the meeting. Next you should decide who needs to attend. Try to ensure that you only invite those who are essential to achieving your objective.

You then need to check the availability of your attendees before scheduling the meeting. It can be frustrating to both yourself and other attendees if the meeting time is constantly moved because some people can't attend. Most organisations now use an online calendar to schedule meetings, as they can see the availability of the employees. If an online calendar is available at your workplace, use this to find a time where all attendees are available for the duration of your proposed meeting. If there is no shared calendar system, you will need to email or talk to attendees to find out their availability to attend a meeting, explaining the purpose of the meeting.

When sending out a meeting request, ensure you state the purpose of the meeting and the objectives you want to achieve. You may also include a draft agenda at this point, along with any background information and pre-reading or preparation requests. If more information is to follow before the meeting, ensure this is stated. This alerts the attendee as to why their presence is necessary and what they may need to prepare.

Example

Why are we meeting?

Lynne has started work as a manager in a large organisation that has several offices, all approximately one hour's drive from each other. In her first week, she meets with all her team and finds out about how they work and what meetings they are involved in. She discovers that all staff were previously expected to attend a meeting in person each Monday to look at schedules and discuss issues. This means that most of her team are losing several hours a week in travel time to attend this meeting. Lynne suggests that they try holding the weekly meetings as a tele-conference and that the whole team will meet once a month instead. Lynne promises to review all the existing meeting requirements to ensure they are necessary, while reassuring her team that she won't reduce face-to-face contact if this is needed by team members.

Prepare the agenda

An effective agenda clearly sets out the expectations for the meeting; what needs to occur both before the meeting and when it takes place.

It is usual practice for any written agenda to be prepared by the person who has been designated as Secretary for the meeting. The chairperson will have the final say on the agenda items. The secretary is a person who has been chosen to assist the Chair in gathering information for the meeting, organising meeting arrangements, recording the proceedings of meetings, then preparing the minutes and issuing them to the participants afterwards.

The way agendas are presented depends on the organisation's policies; some are detailed and include the item in broad terms, the issues to be discussed, who will speak about the item and the time allowed; while others are more basic and simply list the item to be discussed.

It is essential that agenda items are clearly numbered so participants can see the order of the meeting and meeting minutes can be written to match the agenda items.

Agenda components

The main areas included in an agenda vary depending on the focus and style of meeting. The following is a list of commonly used headings and their meanings or procedures.

1. Statement or purpose of meeting

The statement or purpose of the meeting is usually found at the top of the agenda to indicate why the meeting is being held; for example, 'Annual shareholders meeting', 'Rotary fundraising meeting'.

2. Date, time and location of meeting

The date, time and location of the meeting are positioned near the top of the agenda with as much clarification as needed; for example, Saturday 25 June 2015, 10.00 am–4.00 pm, Boardroom 1, Level 2, Pacific Financing, 345 Argyle Street, Sydney.

3. Quorum

A quorum is the number of people required to attend a meeting so voting can be conducted and decisions made. The Chair needs to know how many people are attending and whether decisions are able to be made.

4. Welcome and apologies

The meeting is declared open by the Chair and those non-attending participants (who have notified the secretary or Chair that they cannot be there) are read out by the secretary. The Chair then asks meeting attendees if there are any further apologies known.

5. Minutes of previous meeting

The minutes of the previous meeting (if there was one) are accepted and any amendments are noted before a motion is carried. These are official documents reflecting what occurred during a meeting. They may be required for official records; for example, as in a shareholder meeting of a public company.

6. Matters of business arising from the previous minutes

This means any decisions that were made during the previous meeting and required action are reviewed; for example, a decision may have been made to set a sales target by the next meeting, so the meeting needs to know whether this has been achieved.

7. Correspondence

Correspondence is any communication relating to the meeting (both inward and outward). Each letter or email is read out and if a decision or action needs to be taken, a motion will be moved and seconded by members in the group. The motion would be discussed (if required) and then voted upon by the members in the group. This particular procedure may be deferred to general business when there is more time allowed and greater discussion permitted.

8. Reports

Reports are presented in written form from particular members of the meeting. The Treasurer's report will usually be the first considered, as it may have bearing on other reports and business from a financial point of view. It is good practice to have at hand the reports, the minutes of the previous meeting and the notice of meeting sent out to participants.

9. Major agenda items

Major agenda items are the purpose for which the meeting was called. These may include the general item – for example 'Sales' – but may also include directions, such as 'Review sales targets', 'Discuss monthly sales figures' or 'Decide on advertisement for new sales consultant'.

10. General business

Each department or section may have to report progress or issues that have come up. These may include items left over from the previous meeting, adjourned business or motions on notice. (A motion on notice is an issue for which attendees have had time to consider and make a decision about, or are prepared to raise their objections or state their opinions during the discussion. The motion is said to be foreshadowed. This is usually only used for important matters.)

11. Other business

Once the important matters have been dealt, with the Chair asks for any further business. At this point, any participant may add an item for discussion to the agenda; this is also where any issues from correspondence or reports will be resolved.

12. Next meeting

The Chair will announce the next meeting time and date if known, or action to be taken for advising of it; for example, 'An email will be sent in the next week advising you of the follow-up meeting'.

Agenda items

When preparing an agenda, make sure all relevant items your organisation requires are included. For example, you may be required to:

- include a list of all the correspondence received rather than simply have the heading 'Correspondence'
- include any breaks for refreshments in a day-long meeting
- include the name of the person who is to present each item
- insert a time limit to each agenda item
- cross-reference items that have supporting papers.

Prepare an annotated agenda paper

An annotated agenda is one that includes notes to participants; these notes often explain why an item has been listed in the agenda or why certain attachments have been included.

When arranging meetings for a board, executive or shareholders, you may need to prepare an annotated agenda paper to assist the Chair. This may consist of answers to questions that may arise, background information about a guest speaker they have to introduce or the history of a project.

Use action words where required

If you are creating an agenda item that requires a fuller explanation, begin with an action word (verb) that clearly explains what you want participants to do when discussing the agenda item.

Here are some examples of action words and some contexts to which they may apply.

Decide	▪ 'Decide the next convention venue' ▪ 'Decide on a president'
Discuss	▪ 'Discuss areas where overtime is required' ▪ 'Discuss new carpet installation disruption'
Review	▪ 'Review the accounts' ▪ 'Review recommendations from the previous meeting'
Select	▪ 'Select possible guest speakers for the upcoming convention' ▪ 'Select training candidates'

Prepare the agenda and check for accuracy

An agenda is a workplace document and should meet workplace standards for accuracy, grammatical correctness, punctuation and branding.

If you are delegating the preparation of the agenda to a team member, make sure they use the organisation's agenda template that outlines the format to be followed. If the team member is new, you should give them a sample agenda to familiarise them with the layout.

Once the agenda has been drafted, you need to check that all items are covered and all details are correct. Some organisations accept comments, additions or deletions from staff after they have read the first draft.

Meeting papers

There are a number of meeting papers that may be required before, during and after the meeting.

It is usually the role of the designated secretary to organise and distribute meeting papers, in conjunction with the Chair. This is especially true during the meeting, where the secretary is responsible for accurately recording the proceedings and any decisions made within a meeting.

It is important that all documentation that participants require prior to the meeting is sent to them within a time frame that allows sufficient time for them to read the documentation and prepare themselves for the meeting.

Check that you know the type of papers that need to be sent and who to send them to. Here are some questions that you should ask yourself concerning this.

- What materials are needed to suit the meeting's purpose? How will the materials be dispatched and who will do this?
- Are there any legal requirements, company regulations, statutory requirements or guidelines that must be followed? If so, what are they?
- How can the materials be presented for maximum comprehension and effective use?
- Is the information required to prepare the meeting papers available?
- What procedures and equipment do you require to create the meeting materials?
- Have the meeting papers been checked to ensure they are correct?

Papers required prior to the meeting

It is essential that the Chair and the minute-taker prepare the participants for the meeting properly. To do this they are required to supply them with a number of documents.

The type and amount of detail required in the documentation will depend on the type and purpose of the meeting. For example, an annual board meeting may require a notice of meeting, an agenda (or draft agenda), previous minutes, financial reports, project reports or motions on notice; whereas a staff meeting may only require an agenda (including notice of meeting) and previous minutes.

Additional information that may be useful includes:

- details of any required information the participant should bring with them; for example, paper, pen, laptop, reports, invoices
- list of other participants if relevant
- expectations of the participant and what they can do to prepare for the meeting; for example, give a report, make a presentation, listen and discuss, read an article to be discussed at meeting, watch a video etc.
- whether a reply in the form of an RSVP is required.

Example

Case study

Determine which of these documents need to be sent to participants:

- Notice of meeting; time, date and venue of meeting is essential
- Agenda, so participants know what the meeting will cover; in some instances, the agenda may be given to participants as they arrive at the meeting
- Previous minutes, to ensure their accuracy is vetted by previous participants, and any business arising from minutes is on hand
- Chair's report, including provision of information such as direction of proceedings or additional information regarding a motion on notice
- Any particular correspondence that has relevance to any motion or discussion
- Financial reports, if required
- Itemised meeting papers, when a number of items are to be discussed in a particular order
- Research reports, so all participants are kept up to date on any particular motion, discussion or decision

Tips for organising and running a meeting

Running meetings effectively involves careful planning, facilitation and consideration of the needs of attendees and the organisation.

To do this, you must have a clear understanding of the purpose of the meeting, the needs of all individuals and the organisation, the information that needs to be communicated and how this will be accomplished in the time allocated. The following tips will help you to organise and run a staff meeting.

Tips for staff meetings	
1	**Determine a time and purpose for the meeting** Ask yourself 'Why are we meeting?' and 'What do I want to achieve?' If the goal is non-specific, such as sharing general information, reporting on progress or generating ideas, you should set clear guidelines.
2	**Prepare an agenda** Even for informal meetings, a simple agenda is essential to set out an order of reporting or discussion, and to keep everyone focused on why they are there. If there are papers to be discussed, circulate them in advance. Allow for general business and informal contributions but don't let the meeting be too open-ended.
3	**Limit the meeting time and focus discussion on the set topics** The meeting Chairperson should guide the agenda and only give as much time to each item as is appropriate.
4	**Limit the subject matter** If there is a topic that calls for more time or focus, such as a team building or brainstorming activity, organise a separate session devoted to that.
5	**Make sure there is an expectation that everyone attends** Absences mean the information exchange needs to be repeated at a later date, which is frustrating for everyone; or people miss out, which undermines the purpose of the meeting.
6	**Keep people involved** Consider rotating the roles of Chair and minute-taker. Ensure attendees know they are expected to come prepared and on time. Make the meeting interactive. Ask open-ended questions to generate discussion. Invite contributions to the agenda and make sure each person is able to participate. Ensure that everyone's opinion is respected and that no-one dominates. When each individual has a chance to have their say, there will be greater commitment to work decisions.
7	**Use visual aids or group exercises for emphasis and variety** Don't overdo it – a whiteboard may be all you need.
8	**Document and circulate records** Issues raised and decisions reached should be recorded and circulated. Minutes should focus on action plans so everyone knows what is to happen next.

Practice Task 6

Question 1

Draw a line to match each type of meeting with its purpose.

» Team meeting	» To share information about how set tasks are tracking, discuss any issues and flag any impact on schedules.
» Project meeting	» Seek answers and decisions on any issues, provide updates on work, receive direction and feedback.
» One-on-one meeting	» To share information with staff and discuss/solve any issues collaboratively

Question 2

Which of the following should be done when scheduling a meeting? Tick all that apply.

- ◯ Use an online calendar to determine the availability of the employees and schedule the meeting accordingly.
- ◯ Refer to any procedures for the way the organisation runs its meetings.
- ◯ Send out a meeting request that states the purpose of the meeting and the objectives you want to achieve.
- ◯ Include a draft agenda and any background information, pre-reading or preparation requirements when sending out meeting requests.
- ◯ Schedule meetings at times that suit the most influential team members and managers; if other attendees cannot make it, the meeting can still go on.

Question 3

List five meeting materials that need to be prepared and distributed to stakeholders prior to the meeting.

3B Conduct meeting

If you have called the meeting, it is your role to lead the meeting and conduct it according to your organisation's meeting protocols.

It is essential that you maintain control of a meeting, otherwise the goals it sets out to achieve may not happen. Control can be maintained by keeping to the agenda throughout the meeting and by using your communication and interpersonal skills to encourage participation, keep track of the time, ensure discussion is clear and appropriate, summarise proceedings when necessary, arrange voting when needed and identify any follow-up action. You need to conduct yourself professionally at all times and be confident, tactful, patient and impartial.

Minute taking

Taking minutes of a meeting helps create a record of what actions have been agreed and by who, and of what will be done as a result, including when and by who.

Before you commence the meeting, you should decide on who is taking minutes to record the discussions and actions agreed at the meeting. If the meeting is large, it is better that someone other than the Chair or meeting leader takes the minutes. However, if the meeting is smaller or informal, you may find yourself both leading the meeting and recording discussion and action points. Taking minutes is essential for accurately recording discussion and agreements; these and are usually distributed after the meeting. The following table describes the type of minutes that may be taken in an organisation:

Informal minutes	▪ Small groups sometimes prefer to operate more informally. However, minutes are still a vital component of the meetings. ▪ Minutes will report what occurred at the meeting for future reference, summarise the actions taken, the action planned, the people responsible and any deadlines. ▪ Minutes may include some background information, keeping in mind they are written solely for the benefit of people already familiar with the group and its activities.
Action minutes	▪ Action minutes are best suited for one-on-one meetings that operate in a purely conversational manner. They can be written in point form. Minutes will identify the person or persons responsible for future actions and set time limits. ▪ During many informal meetings the minute-taker, or secretary, is encouraged to participate in discussions. In such situations, action minutes are usually easiest to use.

Formal minutes	▪ In formal meetings, decisions are reached through motions. ▪ Motions are proposals placed before the members for debate and voting. These must be recorded verbatim. ▪ When you are organising the minutes of a formal meeting, follow the same format as the agenda.

Facilitating a meeting

A well-facilitated, active meeting will ensure participation and achieve its outcomes.

If people feel their input is valued, then they will be enthusiastic about being a part of the meeting. It is the role of the Chair to set a positive, productive tone for interaction among the meeting participants, then keep them on track, deflect signs of disruption and handle difficulties smoothly and appropriately.

You may find there are some participants for whom English is a second language; who have different cultural expectations about speaking in an open forum; or have special needs. You will need to use strategies and techniques to ensure everyone is aware of the meeting conventions, understands the information provided and can participate fully. In some circumstances you may need to have an interpreter or provide material in large-print format. Always speak clearly, slowly and explain any technical language and jargon that is used.

Encourage participation and discussion

Facilitate participation by preparing a comprehensive agenda and informing participants well ahead of the meeting so they have time to prepare.

If participants are given sufficient time to prepare, they will come with ideas and suggestions that will help address agenda items and move the meeting along. This effectively saves time and ensures everyone is focused on what the meeting is trying to achieve.

Here are some strategies for including all participants in a meeting.

- Introduce each agenda item clearly and explain what you hope the meeting will achieve.
- Allow sufficient time for debate.
- Refer to participants by their name so they feel they are acknowledged and part of the meeting.
- Understand group dynamics and interaction. Try to involve those people who you know are shy about speaking. Watch for people dominating discussions.

- Encourage involvement by inviting participants to offer an opinion, but don't force the issue if they are obviously reluctant.
- Don't hurry a response from someone just to move the meeting along. Use your judgment.
- Help to summarise or clarify an issue if someone has difficulty explaining their opinion.
- Respect all points of view. Be impartial and don't show signs of being biased or prejudiced about a response.

Contribute to discussions

As well as leading the meeting, you will be contributing to discussions and ensuring meeting objectives are achieved.

You will need to use a range of interpersonal communication skills when contributing to discussions to ensure you effectively share your perspective and allow others to as well. These skills include:

- using effective body language
- using a wide vocabulary
- tailoring your language to your audience
- listening effectively
- presenting your ideas appropriately
- writing clearly and concisely
- working well in a group.

As a leader of the meeting, you will be using your influence to encourage others to discuss ideas and issues in order to make decisions or agree on solutions.

Here are some tips for how to effectively discuss ideas with others.

Create an inclusive environment
▪ Consider your audience. What are their unique characteristics, experiences and perspectives? Use inclusive language and treat all participants with respect and consideration. ▪ Be aware of any barriers to communication (e.g. cultural or linguistic differences) and have strategies in place to overcome them. ▪ Provide sufficient time and space for participants to listen to the idea, gather their thoughts and contribute to discussions. ▪ Provide opportunities for participants to ask questions or share their feelings, concerns or objections. ▪ Ask for clarification if you are unclear about a participant's intent or question.

Encourage participants to contribute
▪ Encourage people to contribute to discussions by: – inviting them to ask questions – asking them to clarify something they have said – asking them to elaborate on a point – bringing past contributions into the discussion. ▪ If presenting face-to-face to a small group, write participants' comments on a board for everyone to see; this helps participants feel that their contributions are valued. Encourage others to add their responses or ideas, or to build on someone else's comments.
Maintain positive and constructive discussions
▪ Clarify your goals at the beginning of the session and outline your expectations for group participation. ▪ Provide equal opportunity for everyone to contribute. Avoid letting one or a few dominant people run the discussion, and do not criticise the contributions of others. ▪ Ensure everyone feels safe and encouraged to participate so a broad range of thoughts, feelings and ideas can be considered. ▪ If the group starts to become negative, ask the participants how they would like to address this, and redirect the conversation back to the topic.

Seek consensus on meeting objectives

Consensus decision making is a strategy for reaching agreement between all members of a group.

Instead of simply voting for an item and having the majority of the group getting their way, a group using consensus decision making is committed to finding solutions that everyone actively supports, or at least can live with. This ensures that all opinions, ideas and concerns are taken into account. Through listening closely to each other, the group aims to come up with proposals that work for everyone.

When leading a discussion, you may need to bring together all of the ideas and try to form a proposal or solution that everyone can agree on. Sometimes consensus can come easily, but on occasions it may take a concerted effort by everyone to reach a consensus.

There are a range of strategies you can use to reach consensus, which may involve using problem-solving and negotiation techniques.

Step 1: Introduce and clarify the issues to be decided.

Share relevant info. What are the key questions?

Step 2: Explore the issue and look for ideas.

1. Gather initial thoughts and reactions. What are the issues and people's **concerns**?
2. Collect **ideas** for solving the problem. Write them down.
3. Have a **broad-ranging discussion** and debate the ideas. What are the pros and cons?

Start thinking about solutions to people's concerns. Eliminate some, short-list others.

Step 3: Look for emerging proposals.

Look for a proposal that weaves together the best elements of the ideas discussed. Look for a solution that addresses people's key concerns.

Step 4: Discuss, clarify and amend your proposal.

Ensure that any remaining concerns are heard and that everyone has a chance to contribute.

Look for **amendments** that make a proposal even more acceptable to the group.

Step 5: Test your agreement.

Do you have agreement? Check for the following:

Blocks: I have a fundamental disagreement with the core of the proposal that has not been resolved. We need to look for a new proposal.

Stand-asides: I can't support this proposal because … But I don't want to stop the group, so I'll let this decision happen without me.

Reservations: I have some reservations but am willing to let the proposal pass.

Agreement: I support the proposal and am willing to implement it.

Consensus: No blocks, not too many stand-asides or reservations? Active agreement!

Then we have a decision!

Step 6: Implement the decision

Who, when, how? Action point the tasks and set deadlines.

Here are some tips for how to effectively reach a consensus on meeting objectives.

Summarise and synthesise ideas
▪ Ensure everyone has had a chance to contribute to the discussion and summarise their ideas, checking for accuracy. ▪ Synthesise ideas by looking for connections and grouping similar or complementary ideas.
Building a proposal
▪ Summarise areas of agreement and disagreement and use the points all agree on to move the discussion on to finding consensus. ▪ Explore reasons for preferences and encourage respectful discussion. ▪ Encourage agreement on the big picture, rather than small details that may be causing dissent. ▪ Explore what one proposal might look like and use attendees' ideas to paint a picture of the solution. ▪ Use problem-solving or negotiation techniques to determine if these could solve any issues raise about the proposal.
Confirming consensus
▪ State clearly what has been agreed and ask all for confirmation. ▪ Don't assume that silence means consent. ▪ Ensure the attendees understand what they are agreeing to and if the decision needs to be ratified outside this meeting.

Example

Qualities of an effective Chair

An effective meeting facilitator/Chair must:

- have good communication skills to participate in sustained, complex, interpersonal exchanges
- speak clearly and unambiguously; this is particularly important in culturally diverse workplaces
- listen to and encourage feedback from participants
- understand group dynamics to enable all participants to be involved
- be alert to where cultural or linguistic factors may be limiting the participation of attendees
- respect everyone's opinions and use a respectful and formal mode of speech with a meeting that includes a culturally diverse group who do not know each other very well
- watch for nonverbal behaviour that may indicate that a participant has a problem; ask for feedback from a cross-cultural group, as this helps prevent misunderstandings
- have the ability to synthesise and summarise information effectively
- handle conflict situations quickly and effectively
- have time-management skills to ensure agenda items are covered
- continually learn to develop and improve their facilitation skills.

Summarise outcomes of meetings

The meeting should conclude by summarising the discussions that have taken place and seeking agreement that your account of the meeting is correct.

This action will also help you or the minute-taker to confirm and clarify the main points of the discussion.

It is likely that actions have been raised and agreed during the meeting. These should also form part of your summary as you close the meeting. At this stage you may need to assign the actions to appropriate staff members and ask for consensus on who will take responsibility for these actions. If this is not a simple task, it may be worth allocating actions at another time and an action to do this is documented.

Close the meeting by thanking the attendees for their time and contribution. It is important to show that you value their skills and experience and that collaborative meetings are effective and worthwhile for everyone.

Finalising and distributing minutes

Meeting minutes may be recorded during the meeting using a laptop, tablet or by hand; the venue and equipment available for the meeting and the time provided for preparation will have a bearing on this.

Minutes and meeting notes need to be reviewed and, if necessary, transcribed as soon as possible after the meeting. Obviously if the minutes have been recorded on a laptop this is unnecessary to some degree, although they must still be reviewed for accuracy and grammatical correctness.

It is best to finish compiling the minutes while the memory of events is still clear in your mind, and they should be submitted as soon as possible after the meeting. If someone other than you has taken the minutes, they may need to obtain further information from you for clarity before the draft is completed. They also need to know when the minutes are required to be distributed so they can factor in the time it will take to transcribe them, make any amendments, re-check them before distribution and include any other material that needs to be sent with them.

Once a draft of the minutes has been completed, they should be checked for accuracy. You may check minutes drafted by someone else or, if you wrote the minutes, ask another attendee to look them over before you finalise them. You should check that:

- the minutes follow the organisation's meeting minutes template
- the date, venue and purpose of the meeting are listed correctly
- all names are spelled correctly
- correct grammar and punctuation are used
- the minutes are concise
- legal regulations are adhered to in respect to confidential information
- motions are worded correctly
- all details are correct
- follow-up action items clearly record who is responsible and by when they need to be completed
- format and style are correct.

Send any amendments back to the minute-taker, or take in amendments you have received, and prepare the final minutes ready for distribution.

Distributing to stakeholders

Once the minutes are finalised, it may be your responsibility to ensure they are distributed to the relevant people in accordance with organisational timelines.

You will need to know:

- the timeline for distribution
- who to send the minutes to: participants; those who could not attend the meeting; those required to receive the minutes in accordance with statutory, legal, organisational and customary requirements such as shareholders; and any interested parties, provided confidentiality and privacy guides are not breached
- whether any follow-up documentation needs to be attached to the minutes, such as a report, discussion paper or a copy of a letter
- confidentiality requirements.

Practice Task 7

Question 1

Which of the following actions should you employ when conducting meetings? Tick all that apply.

- ◯ Keep attendees focussed on one item at a time.
- ◯ Allow discussions to run their course and involve only those attendees who want to contribute.
- ◯ Clarify and summarise points.
- ◯ Help attendees address conflict when it arises by coming up with a well-supported decision.
- ◯ Introduce brainstorms to help people come up with creative ideas.

Question 2

What five communication skills should you employ when contributing to meeting discussions?

Question 3

In what order should you complete the following steps to reach consensus in a meeting?

- ◯ Discuss, clarify and amend proposal, ensuring all participants have a chance to contribute.
- ◯ Introduce and clarify the issue to be addressed.
- ◯ Explore the issue; gather thoughts and reactions and debate emerging ideas.
- ◯ Test the proposal for agreement; consensus is reached when there are no blocks and not too many reservations or stand-asides.
- ◯ Look for proposals that combine the best ideas and solve key concerns.

Question 4

Answer 'Yes' or 'No' to the following statements relating to summarising and distributing outcomes of meetings.

a) Summarising outcomes of meetings helps the minute-taker confirm and clarify the main points of the discussion.	» Yes	» No
b) Meetings should be concluded by summarising the discussions that have taken place and confirming that your account of the meeting is correct.	» Yes	» No
c) Close the meeting by telling the attendees that it's their obligation to keep information discussed confidential.	» Yes	» No
d) Meeting minutes should be produced and reviewed for accuracy and grammatical correctness as soon as possible after the meeting.	» Yes	» No
e) Meeting minutes should be distributed within an hour after the meeting ends so that information is still fresh in participants' minds.	» Yes	» No

Summary

- Effective meetings have a definite and known purpose.
- Attendees will be selected because of their knowledge and the contributions they may make to any discussion.
- Meeting papers must be sent to participants well in advance so they can prepare for the meeting.
- The Chair of a meeting is responsible for leading and guiding participants in an impartial manner so they may fulfil agenda requirements and achieve the meeting's objectives.
- Effective meeting facilitation starts with a review of the goals, or anticipated outcomes, and the agenda.
- The Chair uses group communication and conflict management skills to increase acceptance of decisions made and support a sustained effort toward achieving goals.
- Minutes must be checked for accurate details and correct spelling, punctuation and grammar.
- Minutes and any attached documentation must be sent to all stakeholders in a timely manner.
- Outcomes of a meeting must be reported to the relevant stakeholders as soon as possible so any follow-up actions can be promptly undertaken.

Learning Checkpoint 3
Participate in and lead meetings

Part A

1. Answer 'Yes' or 'No' to the following statements about preparing for meetings.

a) Meetings should only be held when there is a need to inform staff of changes to work processes or organisational structure.	» Yes	» No
b) The use of meetings is very much dependent on an organisation's work culture.	» Yes	» No
c) Most organisations use an online calendar to schedule meetings as they can see the availability of the employees.	» Yes	» No
d) When sending out a meeting request, ensure you state the purpose of the meeting and the objectives you want to achieve.	» Yes	» No
e) If there is no shared calendar system in the workplace, select a time that is convenient to management. All other attendees will make themselves available to appease senior figures.	» Yes	» No

2. Which of the following statements explain why it is important to establish the purpose and aims of meetings? Tick all that apply.

- ◯ It helps participants decide whether they need to attend.
- ◯ It helps management produce accurate employee performance reports.
- ◯ It helps participants focus their attention and understand what is required of them.
- ◯ It helps management categorise its workplace culture.
- ◯ It helps the Chair clarify the outcomes to be achieved, and what decisions or actions they hope to make.

3. Draw a line to match each meeting material with its purpose.

» Meeting agenda	» To ensure all participants are kept up to date on any particular motion, discussion or decision
» Previous minutes	» To ensure their accuracy was evaluated by previous participants and any business arising from previous minutes is on hand
» Chair's report	» To inform participants what the meeting will cover; in some instances, this may be given to participants as they arrive at the meeting
» Research reports	» To inform participants of the provision of information; such as direction of proceedings or additional information regarding a motion on notice

4. What three strategies can you use to manage discussions respectfully when conducting a meeting?

5. Which of the following strategies can assist you in seeking consensus on meeting objectives?Tick all that apply.

- ◯ Clearly state what has been agreed and ask all for confirmation – silence means consent.
- ◯ Take a vote.
- ◯ Use negotiation to reach a solution that everyone supports.
- ◯ Identify the key issue and brainstorm possible solutions.
- ◯ Summarise areas of agreement and disagreement and use the points all agree on to move the discussion on to finding consensus.

Part B

You have asked Vernon, a member of your team, to take the minutes of the meeting you are leading. You tell him the meeting structure will reflect the agenda and his minutes should follow the same format.

1. What six tips can you provide Vernon to ensure he prepares the minutes accurately and distributes them on time?

2. Create a checklist for Vernon to ensure the accuracy and correct format of meeting notes.

Topic 4 | Make presentations

4A Prepare for presentation

4B Present and provide opportunities for audience to ask questions

4C Evaluate presentation

4A Prepare for presentation

In preparing for a presentation, the first steps are knowing why and what you are presenting, and identifying your audience.

Presenting information can be done in various ways and for various purposes. You might be asked to give a presentation on an idea or a new process at a team meeting, or present a major proposal to the board for approval, or present a topic at a conference or network event. Each type of event has a different purpose, content and audience and you need to understand each and prepare accordingly.

Identify outcomes

To identify the outcomes of a presentation, you need to consider its purpose: why are you presenting this information to this group of people?

A successful presentation is measured by how well it achieves its purpose. The intended outcomes for the presentation should be written from the target audience's perspective and define what the audience should know, understand or be able to do as a result of the attending the presentation. For example, shareholders may be invited to attend an annual general meeting, which includes several presentations; the purpose of each presentation being to share information about overall performance and the objectives of a specific part of the organisation's operations.

How you identify the intended outcomes is determined by your role in the organisation and whether the presentation is intended for an internal or external audience. For example, you may be given a brief that clearly identifies the intended outcomes of the presentation; you may develop a list yourself; or you may need to consult others to generate a list of desired outcomes.

Examples of outcomes include:
▪ motivating team members ▪ fostering an interest in sustainability ▪ creating a change in employees' attitudes to work ▪ increasing sales and overall market share ▪ understanding operational change.

Identify appropriate forums

A forum is a meeting or medium that allows the exchange of ideas and views on a specific issue; the constructs of this meeting or medium will be influenced by the purpose of the presentation and the intended audience.

If you have been asked to present, the forum for presentation might be included in the request; for example, 'I want you to present the policy changes at the next staff meeting'. In this example, the staff meeting is the forum for the presentation. However, you might be asked to disseminate information in the form of a presentation and you need to choose the most appropriate forum for your presentation, which will be influenced both by your objective and who your audience is. The forum you choose may be dependent on some of the following factors:

Does the objective require that all staff be informed at the same time?	If yes, then an all-staff meeting would be an appropriate forum. If not, then a team meeting might be more appropriate.
Does the objective require that information is shared with an external audience?	If yes, then a conference, event or network meeting may be the most appropriate forum.
Is the information confidential?	If yes, then it may need to be presented in a closed forum such as a board meeting.

Example

Developing brand awareness

Josie is the product manager at a new start-up for organic, locally produced baby and toddler foods. Her CEO is eager to develop brand awareness in their industry as soon as possible and suggests that Josie looks for opportunities to present at relevant conferences, industry and network events to showcase their products and what they are doing. Josie has a clear objective from her CEO – to increase brand awareness – but she knows that when presenting to an audience, she has to deliver information that is relevant and of interest to them. Josie joined the start-up because they have an innovative way of working which makes work fun and she is proud that they are supporting local communities and healthy eating. So Josie decides to focus on how the team works internally and with local providers to create their products, as she believes it will attract and inspire an audience (many of whom will be parents), and increase brand awareness without a sales pitch. She runs this idea by her CEO, who agrees; Josie then sets about arranging to speak at local business events and conferences.

Identify presentation requirements

Each presentation you prepare will have a unique set of requirements that need to be addressed; these will be influenced by the purpose, audience, forum, technology, organisational requirements, subject matter and time constraints.

There's a lot you need to know before you begin preparing your presentation. Consider the following checklist:

- Has a brief been provided for the presentation?
- What is the total time allowed for the presentation?
- Where will the presentation be delivered?
- What time is the presentation?
- Is there time available for set-up prior to the presentation?
- What technology is available to present with?
- Is there anyone to assist with the set-up of required presentation technology?
- Who is your audience?
- How many people will be in the audience?
- Will all of the audience be present or will some be attending via video or phone links?
- Will the audience be able to ask questions?
- Does the audience have any specific requirements?
- What are the expectations of the audience?
- Are handouts, pre-reading or other documentation required or expected?
- Are there any organisational requirements, policies or procedures that need to be followed?
- How will you and your audience determine if you have met your objectives?

Observe legislative and organisational requirements

Familiarise yourself with any legislative, regulatory or code-of-practice requirements that apply.

Refer to your organisational policies and procedures so that, if you follow these, you are complying with legal obligations. For example, a policy that ensures wheelchair access to your building meets the *Disability Discrimination Act 1992* (Cth). Similarly, there should be procedures to follow to ensure that the venue is safe and healthy and complies with the *Work Health and Safety Act 2011* (Cth) or the health and safety Act in your state/territory. Always use your organisation's templates and style sheets as required by organisational policies and remember your obligations when it comes to confidentiality and code of conduct.

Here are tips for ensuring a presentation observes legislative requirements.

Privacy

When handling and reviewing personal information about participants, be mindful that you have legal and ethical obligations in relation to how you store that information and how you use it. You must comply with workplace privacy and confidentiality policies and procedures. The *Privacy Act 1988* (Cth) regulates how various types of organisations can use personal information, including the information provided by employees and customers. Never use information without a person's knowledge and prior approval.

Anti-discrimination

All workplaces must comply with anti-discrimination and equal opportunity legislation such as the *Age Discrimination Act 2004* (Cth), *Disability Discrimination Act 1992* (Cth), *Racial Discrimination Act 1975* (Cth) and the *Sex Discrimination Act 1984* (Cth). To ensure your presentation is inclusive, you need to take into account gender, age, religion, ethnicity, family situations and sexual preferences.

You must ensure that your presentation strategy provides an equal opportunity for all audience members to participate, including: people with disabilities; Aboriginal or Torres Strait Islander people; people with a language background other than English; and those with a hearing or visual impairment.

Consumer protection

All information provided to audiences must be correct and non-biased in order to comply with the *Competition and Consumer Act 2012* (Cth). Statements made in comparative advertising must be accurate. Inaccurate comparisons that mislead the public are prohibited under fair trading legislation.

Check presentation notes to be sure the text is within the law. You may need to brief other presenters, as any false statements made by them will reflect on your organisation.

Work health and safety

Health and safety Acts prescribe the need for all environments to be free from hazards and risks. When preparing a presentation, ensure that the venue has been risk assessed and has sufficient air movement, is well lit and free from unnecessary noise. Check that all cords are protected to avoid anyone tripping over them, and make sure equipment is in good working order. Presentation introductions should always include emergency procedures and indicate exits and facilities for participants.

Determine communication strategies relevant to your audience

The communication strategies you use to present information should meet your audience's needs. Consider the audience's cultural background, expertise or familiarity with the subject matter and their language abilities.

Find out as much as you can about the people who will attend your presentation. The characteristics and needs of the audience determine how you structure and deliver the presentation, its length, the resources required and the presentation strategies you use. This also includes presentation skills you may need to be aware of, such as your rate of speech, tone and the specific language you use.

Communication styles

Take time to consider the impact of your presentation on others.

As a presenter, using different communication styles both encourages inclusion and increases your chances of being understood.

One way of categorising communication styles is by the senses that we use to process the information. Some people send or receive information better by seeing it (visual), hearing it (auditory) or demonstrating it (kinaesthetic).

The following information illustrates the various communication styles that facilitate audience engagement and learning.

Visual

This is a person who prefers a visual approach and focuses on what is seen, such as documents and diagrams, facial expressions and body language. Good communication techniques include electronic presentations, watching a demonstration, printed handouts, speaking face to face or using video-call/ Skype technology.

Auditory

This is a person who prefers an auditory approach and focuses on what is heard, such as spoken words, sounds and noises. Instructions are best delivered by verbal means, such as asking someone to do something, training, telephone calls, podcasts etc.

Kinaesthetic

This is a person who prefers a kinaesthetic approach and focuses on what is felt or experienced, so they prefer active participation and being involved.

Use a communication style relevant to your audience

Different audiences require different communication styles and content. You may need to use different language or examples to emphasise the parts of your message that are of most interest or urgency to various sub-groups. Sub-groups are people with similar interests or of similar:

- ages
- incomes
- backgrounds
- cultures
- occupations.

Tailoring your information and communication style requires audience research. This may include reviewing the information you already have about your audience (see Topic 1) or conducting further research about sub-groups within your audience.

Researching and analysing your audience helps you to better understand:

- their basic level of understanding about your subject
- what makes them tick and who they are as a collective group
- their individual needs, expectations and communication preferences.

Things to consider on the impact of your communication style to a particular audience
• Be concise. Only include the relevant information about your topic and avoid unnecessary information or irrelevant examples. • Be thorough. Where appropriate, provide detailed information to your audience to make your points clear. • Be considerate. Think about the impact that your message may have on the audience and how you can help them to deal with this. • Be accurate. Double check your facts before you deliver them and make sure they are in a suitable format for the audience. • Be clear. Use language that is easy to understand so that your audience is clear about what you want them to do, and what the desired results are. • Be courteous. Show respect to the audience, and establish trust and rapport by being appreciative, thoughtful and respectful to them. • Be appropriate. Choose the right tone to suit your message and engage your audience.

Presentation styles

There are various ways of presenting information to a group of people, and the presentation style selected needs to suit the presenter as well as the audience. This will go a long way in bridging the gap between delivering information and receiving and retaining that information.

When presenting information to an audience you may need to vary your communication style depending on the topic and the audience or even the location of the presentation. These factors might affect the delivery methods you choose and the impact it will have on the audience.

Presentation structure and strategies

When determining the format, or combination of formats, for a presentation, carefully consider the purpose of the presentation and the characteristics of the target audience.

Here is a range of different formats that need to be considered when delivering a presentation.

Individual presentation

An address to an audience made by one person is appropriate for a wide range of purposes.

Target audiences include staff members, customers, community groups, professional bodies and shareholders at an annual general meeting.

Team presentation

Members of a group may share delivery of a presentation for customers (sales team presentation), shareholders (at an AGM), members of a sector that need information from multiple experts (at a conference).

Team presentations are effective when the purpose is to:

- build the image of the organisation
- introduce staff to customers
- expose audience to a range of ideas and perspectives
- share information from technical or subject experts
- maintain audience interest during long presentations.

Guest speaker

Guest speakers can contribute information in their area of expertise. A guest speaker may be engaged to make a presentation that is topical and entertaining or as keynote speakers on a conference theme.

The guest speaker should be briefed on any organisational policies (for example, culturally inclusive practices, access and equity, WHS, ethical behaviour) and codes of practice.

Group activities

Participants may be divided into groups led by a facilitator or presenter. This technique may be used for discussing new ideas or when you wish people to actively participate in the presentation. Tasks for activities must be well prepared and timed. Groups should be monitored during the presentation to ensure understanding. The guest speaker should be briefed on any organisational policies (for example, culturally inclusive practices, access and equity, WHS, ethical behaviour) and codes of practice.

The presentation may involve specific strategies that need to be incorporated into the session plan. These strategies depend on the nature of the presentation and the target audience.

Here are some strategies that may be used.

Demonstration

Demonstrations are appropriate if the purpose of the presentation is to introduce new products, explain product features or promote sales. Likewise, presentations that are designed to train audience members to perform a task, use a piece of equipment or technology, or follow strict protocols are likely to be enhanced by a demonstration. Keep in mind that they are more effective if participants are active; and feedback must follow immediately after practice.

Questions

You may develop a series of questions to be used strategically during a presentation to encourage reflective thinking and discussion, and to check understanding of the presentation's content. Alternatively, the presentation could involve an individual or panel that is asked a series of structured questions by a facilitator, where the questions are designed to elicit information relevant to the topic and purpose of the presentation.

Case studies

Participants are given information and asked to make a decision or solve a problem concerning the situation. Well-constructed case studies give participants an opportunity to think laterally and generate solutions to help them in their workplace. Ensure you spend time giving clear instructions about the purpose and outcome expected to ensure everyone understands. Case studies may be difficult for learners who have reading or language barriers.

Discussion

Presentations should include opportunities for participants to ask questions or discuss ideas. Either stagger these throughout the presentation or provide a question time at the conclusion of the actual presentation. The introduction to the presentation should explain that opportunities for discussion that will be available during the session.

Presenting information

As a presenter, your role is to communicate with the audience and control the presentation.

When preparing your presentation, keep the following in mind:

- Be aware of the context and resources you will have access to.
- Consider the purpose of your presentation; it will dictate how you prepare it and the style you use.
- Consider the characteristics, experiences, knowledge and values of your audience; this will affect the way they receive the message.
- Use different ways of communicating to suit this audience to make it a more successful and effective presentation; for example, use different tools, facilities and equipment, and different styles of presenting.

Create and present clear verbal messages

The information you present must be delivered clearly in order for the audience to receive your message.

When communicating verbally, choose the best time and place; make the communication clear, brief and logical; and be prepared. If there is detailed or sensitive information to share, you may need to make notes and outline key points in writing so you can maintain a professional approach.

Tips for presenting clear verbal messages
▪ Project your voice so you can be heard. ▪ Avoid a monotonous pitch and tone to promote audience attention. ▪ Speak at a comfortable pace. ▪ Pronounce words clearly. ▪ Make eye contact as appropriate. ▪ Make use of strategic pauses. ▪ Use natural gestures and movements to reinforce the verbal message. ▪ Look for nonverbal cues from your audience, and adjust as required.

Presentations of all types rely on communicating the central message successfully to the target audience. Where the objective of the presentation is to encourage the target audience to take action or change their attitudes or beliefs, you also need to use communication techniques that have the power to persuade.

Effective communication is the key to any presentation. You need to connect with the audience, use language that is accessible to everyone and keep them interested. Once you have their interest, you can use the remainder of the presentation to convince them of the idea or concept and, hopefully, gain their agreement to take specific action.

Verbal communication techniques

There are a number of verbal communication techniques that you can use to deliver and receive messages more effectively. This will require both careful planning and continued reflection.

Speak clearly, using an appropriate tone, pace and volume. Vary the pitch of your voice to avoid a monotone presentation that encourages boredom in listeners. Consider individual differences and the audience's ability to listen and understand what is being said. You may need to adjust the way you speak. For example, you may need to speak more slowly and clearly for people whose first language is not English. Keep your voice at its usual volume, though. Being shouted at does not increase a person's ability to understand English.

Use language that can be understood and assimilated by the target audience. Pitching language or information at the wrong level can reduce the effectiveness of your communication. Effective verbal communication relies on you using the appropriate structure, vocabulary, emphasis and supporting materials to suit your audience's characteristics.

Here are some language principles to keep in mind when delivering a presentation.

Technical jargon

Use technical and industry jargon only to people you know will understand. Always consider the audience's background and what they are likely to know. If such language is crucial to the presentation, then define technical words and phrases and confirm participants' understanding.

Colloquial words and phrases

Avoid using Australian colloquialisms or slang that may confuse people whose first language is not English. Comments such as 'She'll be right' and 'We'll cover that in the arvo' may be meaningless to many people and may lead to misunderstandings.

Non-discriminatory language

Always use non-discriminatory and inclusive language. Repeating the word 'he' when you mean both males and females can be off-putting to many people.

Don't use sexist language or cultural stereotypes that are likely to offend participants.

Continually check that your verbal communication is clear, jargon-free and culturally appropriate. Address any weaknesses or areas that need improvement by self-assessing or partnering with a critical friend.

Reflect on your use of language by considering the following questions

- Are you using language at an appropriate level for the audience or learners?
- Have you contextualised your language so it is appropriate to their situation?
- Are you using language that is culturally appropriate?
- Are your explanations and instructions free from unfamiliar jargon or concepts?
- Do you frame concepts in a way that is meaningful by relating them to participants' work or life experiences?
- What impression do you create with your pitch and tone?
- How often do you use fillers such as 'um' and 'ah'?
- Do you regularly repeat certain phrases such as 'at the end of the day' or 'moving forward'?

Nonverbal communication

Nonverbal communication is an important part of persuasion.

Body language, particularly hand gestures and eye-contact, is used to emphasise important points. Smiling at appropriate times makes people feel comfortable. Adopt a non-threating stance; leaning forward and sweeping a glance across the audience from time to time lets them know you are aware of them.

Be aware of your body language to ensure congruence between your words and actions and avoid overusing particular gestures. Participants can be easily distracted by a presenter's personal habits, such as making repetitive hand movements or pacing during a presentation or demonstration.

Eye contact is a key element in any public speaking situation. Try not to focus on reading materials or slides while instructing or demonstrating. You need to be familiar with the content of your presentation so you can make eye contact with the audience, hold their attention and gauge their understanding. Use eye contact to emphasise key points in the instruction or demonstration. For example, when you are explaining safety instructions, make eye contact with each learner to ensure they are listening and responding positively.

Research presentation content

It is crucial that the information you present is relevant and well researched.

An audience needs to be confident that you and your organisation can be trusted to provide current and accurate information. Material that is not relevant, is of a poor quality or has no factual basis does not help promote the organisation.

Research should be appropriate to your topic, the purpose of the talk and the needs and interests of your audience. You may already have the information and data you need in the form of a report, the organisation's policies and procedures or other documentation relevant to the presentation. Sometimes you may have to do additional research by speaking with other professionals, contacting industry professional groups, reading articles in industry journals or conducting internet research.

Here are some tips for guiding your research.

Recent is best

Focus your research on the most recent findings, unless you specifically need earlier data.

Check your facts

Seek academic journals and papers for more-detailed information about a topic. Read the abstracts, which give a concise summary of the main body of the paper. Include anecdotal information to illustrate key points and give your presentation some interest, which will help the audience remember it afterwards.

Check your sources

Make sure you are not infringing copyright by reproducing information without permission; that you do not use confidential or restricted information without permission; or reveal any details that could cause distress for a staff member or client.

Reference appropriately

You may need to cite the sources you have referred to, particularly for formal presentations such as at a conference. Use an accepted format to show where you have found your information. Be aware of plagiarism and copyright laws.

Draft a plan for the presentation

Initial preparations should include a draft plan that outlines your approach and how you intend to deliver the information. This may change following consultation with others.

Your organisation may have a template to use for this purpose, designed to suit the different presentations that are regularly given in the organisation, such as staff meetings, information sessions or induction training. For example, a marketing department may have a template for planning promotional presentations to customers.

For a more complicated presentation some people prepare a storyboard; a series of rough sketches/outlines used to show the flow of the presentation and depict the main idea for each section. Storyboards give a visual representation of the final presentation and are useful for consultation with stakeholders and designers.

Decide on your presentation techniques

Presentations can be enhanced by using new technology and equipment, and techniques that add colour, sound, images and video to create interest, add emphasis and reinforce ideas and concepts.

Be cautious when selecting the techniques that you will use to enhance your presentation: including too many can overwhelm the content. Select techniques based on the intended outcomes of the presentation. Keep in mind what the presentation is meant to achieve and the characteristics of the target audience. Evaluate each available technique by asking, 'How will this technique help me achieve the presentation outcomes with this target audience?'

Create your presentation

Creating your presentation may involve something as simple as a list of bullet points you wish to cover or may be as complex as a visual presentation with video, sounds or practical demonstrations.

All the work you have done prior to this stage will assist you in shaping and creating the presentation you wish to deliver to your audience.

Here are some tips for creating your presentation to consider:

- Write down your objective and then all the information you need to convey to achieve that objective
- Shape the information in a way that will engage your audience. For example, tell it as a story, include examples, etc.
- If using presentation software, create slides that will ensure that you keep audience requirements in mind; and make them simple and easy to read.
- Check to see if you are required to use organisational templates and style guides for presentations.
- If using presentation software, choose appropriate and meaningful images to appeal to visual communicators
- If you're presenting without presentation tools, condense what you want to say into concise talking points.
- Remember to include evidence and examples to support your statements.
- Check to see if you have achieved your objective and ask others for their opinions.

Make final preparations

During the planning and preparation stage, finalise the ways in which you intend to incorporate presentation aids and materials to enhance your presentation.

Use a range of delivery methods, presentation aids and materials so audience experiences are varied, interesting and challenging.

Use a checklist or action plan to ensure that activities such as software installation, risk assessment, printing or modification to suit the individual needs of participants are completed in advance of the presentation. Your final preparations should include the following points.

Final preparation tips
• If you are not already familiar with the equipment or technology you intend to use, arrange for training and practice well ahead of time. • Organise technical support and ensure that you obtain any troubleshooting information you need and have it available during the presentation. • Practise using your aids and materials with the equipment provided; deliver a 'dress rehearsal' if you can. • Ask an observer, or record a rehearsal, for feedback on your use of equipment, aids and materials, delivery rate, voice level and language use. • Check that the sequencing of the information is logical, clear and sustains interest level.

Practice Task 8

Question 1

Draw a line to match each organisational objective to the correct presentation forum.

» Staff meeting	» Information about the new product must be shared with prospective wholesale and retail buyers.
» Conference / event	» The information to be presented is highly sensitive.
» Board meeting	» All personnel must be informed about the change to the CRM system.

Question 2

Which tone, structure and style of communication would you use when delivering a presentation to your team? Tick all that apply.

- ◯ The presentation should be extensive, with an explanation of background information and terminology.
- ◯ Use an informal, friendly tone.
- ◯ Use technical jargon.
- ◯ Use a formal, authoritative tone.
- ◯ The presentation should be brief and to the point as participants will have knowledge of background information.

Question 3

How would you prepare a presentation to ensure it meets desired outcomes? Put the following steps into order.

- ◯ Choose appropriate and meaningful images to appeal to visual communicators.
- ◯ Create the slides ensuring that you keep audience requirements in mind and make them simple and easy to read. Use organisational templates and style guides for presentations.
- ◯ Check to see if you have achieved your objective and ask others for their opinions.
- ◯ Shape the information in a way that will engage your audience. Include evidence and examples to support your statements.
- ◯ Write down your objective and then all the information you need to convey to achieve that objective.

4B Present and provide opportunities for audience to ask questions

While you are presenting, you need to be aware of how your audience is responding to what you are saying.

You have done all the hard work preparing for your presentation and now you have to deliver it. When you are presenting with the intention of influencing your audience, you need to be able to look for cues from your audience which indicate whether you are succeeding in your intentions. This will allow you to tailor what you are saying to better engage your audience and prepare you for the type of questions that might follow your presentation.

Participants are rarely inactive during a presentation. They communicate their reactions to the presentation and the performance of the presenter using various verbal and nonverbal communication signals. Skilled presenters continually scan the audience for cues that allow them to gauge whether they need to make any changes in order to achieve the outcomes that were planned for the presentation.

Understanding how to respond appropriately to the verbal and nonverbal messages from participants requires presenters to apply their knowledge of effective communication.

Monitoring participants

To monitor participants, you need to be able to identify and interpret both their body language and verbal cues.

It can be hard for participants to avoid showing their reactions to the material that is being presented. Various verbal and nonverbal behaviours communicate a participant's emotional response, such as interest, negativity, frustration or enjoyment.

Presenters need to be able to correctly interpret the cues given by participants to identify whether the delivery style needs modification or if presentation content should be changed.

Presenters have to monitor participant reactions and make quick decisions about corrections to content and delivery style.

Verbal cues

Verbal cues are the spoken words we use to communicate with others.

Verbal cues such as participants verbalising an issue or problem, asking a question or muttering under their breath are indications that your central idea is not being transferred as effectively as it should be.

However, participants may also use verbal cues to demonstrate positive responses. Indications that participants are interested in the content of the presentation and are reflecting on how they may use the information in the future include:

- discussing practical applications of the central idea
- suggesting further improvements
- asking for further information.

Nonverbal cues

Nonverbal cues refer to the communication between people that is not verbally translated, such as body movements, facial expressions, attire, voice nuances and body orientation.

Nonverbal cues are often very subtle and may not always be a reliable to way to establish if a problem exists. A combination of cues, however, can be more useful.

Consider also the influence of culture on communication. The way people communicate can reflect their cultural backgrounds; for example, in some Asian cultures a person nodding their head is not necessarily signalling that they agree with you. Wherever possible, be aware of the cultural makeup of your audience so you can take any cultural differences into consideration.

Here are examples of positive and negative nonverbal cues.

Positive nonverbal cues	Negative nonverbal cues
Be alert to nonverbal cues that indicate if the presentation is going well and the planned outcomes are likely to be achieved. Examples that show that participants are responding positively to the presentation include: ▪ smiling ▪ leaning forward ▪ nodding ▪ watching the presenter.	Nonverbal cues indicating a negative response such as disagreement or boredom include: ▪ shrugging ▪ shaking the head or opening palms ▪ facial expressions showing surprise, or frowning with confusion or disbelief ▪ sighs, tongue-clicking or grunts.

Deal effectively with negative attitudes

There may be instances when your audience is not receptive to the message you are trying to convey or to the method you are using to convey it.

At all times, you must try to maintain your connection with the audience. Disengaged, uninterested audiences are unlikely to remember the key points from your presentation, as are people who do not understand your message.

Restless individuals may distract other people from your presentation. Negative comments from the audience have the potential to take over the discussion, encourage other participants to focus on problems and create a general air of negativity. You need to be able to think and act quickly to resolve problems such as these.

A change to your delivery style could involve:
▪ shifting the pace of your delivery ▪ using presentation aids or materials in a different way (for example, stopping the DVD and asking a question) ▪ injecting humour or an anecdote to re-engage interest or relieve tension ▪ asking participants to complete an activity ▪ forming break-out groups ▪ taking a short break ▪ confronting any negative comments or issues and their proponents directly.

Deal effectively with lack of understanding

It is important to check that you are interpreting these cues correctly before proceeding with the presentation, particularly when you are delivering training.

Signs that a participant does not understand something or is not confident that they will be able to apply the learning should be addressed as quickly as possible, as this may affect their ability to learn more complex or difficult concepts later in the presentation. Handle situations such as this sensitively; it may be best left for a private conversation later.

Here are some strategies for dealing with cues that indicate confusion.

Disengaged, uninterested,
Paraphrase any queries or concerns to ensure you understand the issue and then suggest solutions or alternatives.
Ask the participant to expand on why they are confused or unsure and lead them towards the solution.
Invite other participants to share their experience or knowledge of the topic.
Give the information again in a different format, such as using a demonstration.
Arrange for additional support where necessary, or provide presentation materials in a format suitable for an audience member with a specific need.

Provide opportunities for questions

Always provide time for the audience to interact or to query an issue.

Some people feel let down if they are not allowed to comment or pose a question to the presenter about an issue that arises from the presentation.

Set the ground rules for asking and answering questions in your introduction to the presentation. Explain to the audience when you will take questions.

Here are strategies to use to take questions.

At the start

It is useful to provide an opportunity for participants to ask questions after you have made the introductory remarks and set the scene for the presentation. Participants may need clarification of concepts or ideas early on, and may become distracted or frustrated, and not understand later material if they have to hold their question until the conclusion. They may forget their question or have difficulties making a cognitive link back to earlier information. It also lets them know that you are willing to explain anything they are unsure of and are flexible and willing to change any aspect of the presentation to suit their needs. If you prefer questions at the end of the presentation, consider having an assistant record the questions for you to respond to later in the presentation.

During

You may prefer to have questions asked throughout the presentation, although you may need to be flexible on this to meet your audience's needs. Your plan may be to use questioning to encourage audience participation and to monitor reactions to the presentation's central ideas and concepts. Let the audience know how to indicate that they have questions; for example, if they should raise a hand. Acknowledge (either verbally or using body language) that you have noticed that a person is waiting to ask a question so they do not become agitated and distract other people.

In the break

When appropriate, you may prefer to invite audience members to write their questions on a whiteboard during a break in the presentation, so the information can then be referred to visually as well as verbally. This strategy is useful as the basis for workshopping or discussion activities after a formal presentation. This approach also means audience members can ask questions as you move around the room, and encourages anyone who is hesitant to ask questions in a large group to feel able to question you in a less intimidating setting.

At the end

Many presenters prefer to ask their audience to keep questions until the end of the presentation, so they do not disrupt the flow of the presentation. Time may be allocated near the conclusion of the presentation, perhaps before your final summary, so you are then free to wrap up the presentation by summarising key concepts and ideas.

Manage questions appropriately

One of the most challenging parts of delivering a presentation is managing questions as it is something completely out of your control.

While questions asked during a presentation are not necessarily a test of your credibility and expertise in delivery, some questions can be challenging. There are strategies you can use to deal with questions from the audience who are seeking clarification on a specific concept or ideas contained in your presentation.

Here is a range of strategies to manage questions.

Confidence and sensitivity	▪ Speak with confidence when answering questions, and avoid rushing your response or sounding frustrated or annoyed. ▪ Be sensitive to the individual characteristics of the audience members when formulating your response. Use words that express empathy with the participant's situation. Thank them for their question or comment.
Nonverbal communication	▪ Use body language that displays a positive, confident manner. Use eye contact to acknowledge the questioner, but include the entire audience in your response by using hand gestures and body language. Ensure congruence between body language and the message.
Active listening	▪ Allow the participant to finish asking their question before seeking clarification or interjecting with an idea. Delay making judgments and forming solutions until you have heard the person out. You will not really listen if you are busy thinking about what you want to say next.
Pace your response	▪ You do not need to answer a question immediately. Pause to collect your thoughts and ask the participant to clarify their concern if necessary. This will give you time to plan your response.
Offer to follow up	▪ Questions that are off-topic or require complex or technical answers may be better handled after the presentation. Give a brief answer and offer to speak to the participant later or provide your contact details.
Multi-part questions	▪ Multi-part questions can pose extra challenges. Decide if you will answer all parts of the question or only the most relevant part. If necessary, ask the participant to restate the question or to be more specific. Acknowledge that there is more than one question being asked and identify those parts that you will answer immediately. Offer to address the other questions later.
Comments	▪ Participants may use the question session to make comments on the central idea or concepts being discussed. Acknowledge the comments and thank them for their contribution to the discussion. If appropriate, offer to talk to them further after the presentation.
Stay focused	▪ Practise giving direct responses. Avoid spending too much time replying to one question (no matter how interesting you and the questioner find it) to ensure you allow time for other questions. ▪ Quickly wrap up a discussion that has gone on too long or is not relevant to the purpose of the presentation.
Use the audience	▪ You do not have to answer every question personally. Draw on the experience and ideas of the audience by reframing and redirecting questions to them.
Difficult questions	▪ Dealing with difficult questions is a skill that improves with experience. You may not immediately have sufficient knowledge of the audience to anticipate the questions, issues or concerns they may raise in response to the presentation's content. ▪ Have a plan for dealing with persistent or aggressive questioners. Ask experienced presenters and trainers how they keep a presentation focused on the central idea, concepts and intended outcomes.

Example

Responding to your audience

Sophia was asked to present at a team meeting on the new CRM system the organisation was planning to introduce. She was told her objective was just to inform the team and explain how it would make life easier for them. Sophia put together a brief presentation which started by describing the new CRM and the reasons for implementing it. As she began, Sophia observed the body language of her audience: arms were crossed, faces looked confused and some people weren't paying any attention. Sophia decided to stop and ask her audience if they were previously aware of plans to implement a new CRM. She was met with a chorus of no's and some remarks about why do we keep changing things? Sophia decided to pause her presentation and get the audience involved. She asked them to describe the current CRM and all the things they liked and disliked about it. As the audience spoke, Sophia wrote down the comments on a white board. When they were done, Sophia jumped to part of her presentation that listed all the features and benefits of the new CRM. Her audience was then delighted to find that the new CRM would have all the features they liked from the current CRM and the added functionality they were looking for. Now with an engaged audience, Sophia continued her presentation to explain the timelines for implementation and the training that would be provided. Sophia left the meeting, satisfied she had achieved her objective, having sold the team on the benefits of the new CRM.

Practice Task 9

Question 1

Draw a line to match each questioning period to the opportunity it provides participants.

» At the start	» You can use this type of questioning to encourage audience participation and to monitor reactions to the presentation's central ideas and concepts. Let the audience know how to indicate that they have questions; for example, if they should raise a hand. Acknowledge (either verbally or using body language) that you have noticed that a person is waiting to ask a question so they do not become agitated and distract other people.
» During the presentation	» This allows audience members to ask questions as you move around the room, and encourages anyone who is hesitant to ask questions in a large group to feel able to question you in a less intimidating setting.
» In the break	» This approach ensures that there are no disruptions to the flow of the presentation. Time must be allocated to answering questions as well as to permitting you to wrap up the presentation by summarising key concepts and ideas.
» At the conclusion	» Participants may need clarification of concepts or ideas early on, and may become distracted or frustrated, and not understand later material if they have to hold their question until the conclusion.

Question 2

Which of the following techniques can you use to answer questions clearly and concisely? Tick all that apply.

- ◯ Speak with confidence and avoid rushing your response or sounding frustrated or annoyed.
- ◯ Allow the participant to finish asking their question before seeking clarification or interjecting with an idea.
- ◯ Pause to collect your thoughts and ask the participant to clarify their concern.
- ◯ Use body language that displays a positive, confident manner.
- ◯ Spend as much time as you need to thoroughly reply to a question.

4C Evaluate presentation

After the presentation has ended, it is important to follow up with stakeholders to determine if they are satisfied that the presentation's outcomes were achieved.

You may be able to discuss the presentation with stakeholders immediately after the presentation or meeting is finished or you may need to make a time to follow-up up with the stakeholders soon after to seek their feedback.

Your stakeholders may include:

- your manager
- decision makers
- the person who invited you to speak
- audience members.

The primary aim of your follow-up conversation with stakeholders should be to determine if you achieved your outcome and were successful in influencing them to adopt your position. Stakeholders may have further questions they want to ask about your position, and you may want to confirm actions that should result from your presentation.

Ensure you make it clear what the purpose of your follow-up conversation is and also use the conversation as an opportunity to obtain feedback on your presentation skills.

Evaluating your presentation

When audience members reflect on a presentation, they usually focus on two key areas: the presenter's performance and the content of the presentation.

They will also have formed an opinion about the venue, catering, other audience members, the supplementary material distributed and the various other components that added to their experience of the presentation. Gathering feedback about these elements is an important mechanism for improving future presentations.

Your objective in conducting an evaluation is to determine how effective the presentation was in achieving its intended outcomes and highlight areas for improvement in the future. The evaluation technique should primarily gather information about the changes in participant behaviour, knowledge or attitudes that are the intended outcomes of the presentation.

To determine the success of a presentation you may ask participants to complete a questionnaire or provide verbal or written feedback about its effectiveness and how it could be improved and whether their knowledge, attitudes or behaviour have changed as a result of the presentation.

It is also important to gather feedback on the individual components that make up a presentation to determine which were successful.

Areas to evaluate should include:
▪ content ▪ presenter (voice, pace, timing, engagement) ▪ audience engagement ▪ support for individual participants ▪ quality and suitability of materials and handouts ▪ effectiveness of presentation aids and technology.

A critical friend can be a source of valuable feedback on your performance. A critical friend is a person with whom you have a professional relationship. The relationship should be based on trust, support, openness and a desire to foster personal development.

A critical friend must understand the intended outcomes of the presentation and your personal goals for improving your own performance. They should be a skilled observer and listener. They can ask questions and challenge you to reflect critically on your performance by providing a different perspective, and they can provide valuable feedback at all stages of your presentation work.

You could provide them with a review form with areas you wish them to comment on, such as pace and tone of delivery, rapport with the audience, clarity of expression, time management, quality of supporting materials, and success in achieving outcomes.

Here are some areas that you may want to focus on and discuss when evaluating audience reactions for specific types of presentations, whether through a questionnaire or anecdotal feedback.

General presentation

When seeking reactions to a presentation, keep in mind the:

- accuracy and currency of information
- suitability of the presentation format for the needs of the audience
- credibility of the presenter
- presenter's delivery style and duration of the session
- amount of detail included, and whether it was appropriate
- quality of presentation materials
- opportunities to ask questions and make comments.

Sales proposal

If the presentation was a sales proposal, then consider the:

- likelihood of the customer proceeding with the proposal
- reasons why the customer might accept or object to the proposal
- changes the customer would like made to the proposal.

Promotion

If you were promoting a particular product, service or process, check the:

- relevance of the content to the audience
- level of audience interest
- duration of the presentation
- audience's ability to relate to the presenter
- suitability of cost and timing of program activities
- opportunity to take the action promoted
- creativity and innovation in presentation materials.

Public relations

If the presentation was designed to promote the organisation, then consider:

- the appropriateness of the communication medium
- whether the media channel reached the target audience
- the impact of the central idea or message on the target audience
- the target audience's attitudes to the company/product/ service or person who is the campaign focus.

Market trial

If you presented a product, service or idea as a trial, check:

- the audience reaction to the item that is the campaign focus
- the suitability of the presentation method and techniques
- whether communication channels were appropriate to the target audience
- changes in attitudes, behaviour or knowledge as a result of the presentation
- suggestions for improvements from the target audience.

Training

If your presentation was a training session about a new process or to develop people's skills and knowledge, then consider:

- the value of the training
- elements of the training that can be improved or were considered highlights
- relevance to learners' job roles/individual needs
- contextualisation
- session duration
- quality of learning materials
- where learners believe the training will lead them.

Self-reflection

It's important to reflect on your own performance before and after you have received feedback.

Try to find a time soon after the presentation is over to reflect and write down what you think went well, what might not have gone so well and if the questions and response were what you anticipated. Think about how you felt before, during and after your presentation. Consider how effective your choice of presentation style, pace and delivery were and what you might change or do differently next time. Don't forget to consider how well you monitored audience response and how you anticipated and handled their questions. Self-reflection will better prepare you to receive feedback from others and allow you to consider their feedback in relation to your own perceptions of your presentation performance.

Discuss findings

It can be helpful to debrief and discuss the findings from a review with your manager, colleagues and, where appropriate, the people who provided the feedback.

Often, colleagues and those involved in the presentation can provide more comprehensive feedback and be more honest and encouraging. You may need to clarify a statement or suggestion or confirm the findings and agree that improvements need to be made.

Always approach a discussion with an open mind and be prepared to listen to other people's reactions and ideas, as they may come from a perspective completely different from your own.

Discussions may be formal with arranged meetings and an agenda, or informal chats. Regardless of the format, the intention should be to ascertain whether the presentation delivered the intended outcomes for both the audience and the organisation.

Identify areas for improvements

Collate the positives and negatives from your feedback to help you identify areas for improvement.

Discussion with a manager or colleague may help identify actions to improve specific skills. There may be some changes you can implement immediately that relate to content and tools, and others such as confidence and body language that will only improve with practice. Carefully consider the feedback that relates to your effectiveness as an influencer. Discuss strategies that may help you be more effective and ensure you look at both the content of your presentation, your presentation style and the way you handle questioning.

Create actions to implement the skills you want to improve and ensure you incorporate these into future presentation checklists. Use every presentation, however brief, as a chance to practice these skills and continue to reflect on your performance and areas for improvement.

Example

Feedback

Bailey was nervous before her presentation to the board. She asked her colleague, Alexis, if she could observe her in the meeting and give her some feedback afterwards. Alexis agreed and they arranged to meet immediately after the meeting.

'How did I do?' Bailey asked anxiously.

'How do you think it went?' Alexis asked.

Bailey sighed. 'Okay, I think I got through it on time and they didn't ask too many tricky questions. The chair did say "well done" and thanked me.'

'You did well,' Alexis assured her. 'It can be daunting presenting to the board. It looked like they were impressed by what you had to say.'

'Really?' Bailey asked. 'They're quite hard to read and when Malcolm interrupted me …'

'You handled that really well,' Alexis told her. 'You were polite and brief and he seemed satisfied when you moved on to the information he wanted.'

'So what could I do better?' Bailey asked.

'You were very nervous,' Alexis admitted. 'That can make you sound less convincing, but you ended very confidently and handled their questions well. The nerves will only go away with more practice. Trust me, I know!'

'What did you do to get over them?' Bailey asked.

'Where possible, I have a practice run in the same meeting room and I try to get in the meeting room by myself shortly before the meeting to practice standing at the front, taking deep breaths and calming myself,' Alexis confided. 'But you'll have to find a strategy that works for you.'

'Thank you,' Bailey told her. 'I might try that and see how I go.'

Practice Task 10

Question 1

Why should you follow up with stakeholders after a presentation? Tick all that apply.

- ◯ To determine if you achieved your outcome
- ◯ To determine if you were successful in influencing them to adopt your position
- ◯ To relay confidential information that you could not discuss openly during the presentation
- ◯ To confirm actions that should result from your presentation
- ◯ To answer any further questions stakeholders may have about your position

Question 2

Identify two strategies for evaluating your presentation.

Summary

- A successful presentation is measured by how well it achieves its purpose.
- The intended outcomes of a presentation are determined by your role in the organisation and whether the presentation is intended for an internal or external audience.
- You need to fully identify the presentation requirements as the first step in preparing your presentation.
- The characteristics and needs of the audience determine how you structure and deliver the presentation, its length, the resources required and the presentation strategies you use, which include tone, structure and communication style.
- It is crucial that the information you present is relevant and well researched. An audience needs to be confident that you and your organisation can be trusted to provide current and accurate information.
- Choose and use presentation tools and techniques appropriate to your audience.
- When creating your presentation, ensure it addresses both your objective and the needs of your audience.
- Presenters need to be able to correctly interpret the cues given by participants to identify whether the delivery style needs modification or if presentation content should be changed.
- Always provide time for the audience to interact or to query an issue.
- Set the ground rules for asking and answering questions in your introduction to the presentation.
- Follow up with stakeholders to determine if you achieved your outcome and were successful in influencing them to adopt your position.
- Evaluate your presentation using both self-reflection and feedback from stakeholders.
- Use feedback to identify areas for improvement and create an action plan to implement improvements.

Learning Checkpoint 4
Make presentations

Part A

1. List two strategies you could use to respond to each of the following types of questions:
   - Multi-part questions
   - Comments
   - Off-topic questions

2. Answer 'Yes' or 'No' to the following statements about following up with stakeholders after a presentation.

a) To evaluate a presentation, you can ask participants to complete a questionnaire or provide verbal or written feedback.	» Yes	» No
b) Feedback should be sought on pace and tone of delivery, rapport with the audience, clarity of expression, time management, quality of supporting materials, and success in achieving outcomes.	» Yes	» No
c) A critical friend can be a source of valuable feedback on your performance.	» Yes	» No
d) Feedback from senior management, the CEO or board members is the most valuable.	» Yes	» No
e) A checklist can be used to collect feedback that is insightful and identifies areas requiring improvement.	» Yes	» No

3. Which of the following strategies would you use to evaluate your presentation and identify areas for improvement?Tick all that apply.

- ◯ Reflect on your performance before you have received feedback, as this will help you keep objective.
- ◯ Self-evaluate in order to determine how effective your choice of presentation style, pace and delivery were, and what you might change or do differently next time.
- ◯ Seek written or verbal feedback from relevant stakeholders, including audience members and colleagues.
- ◯ Collate the positives and negatives from your feedback to help you identify areas for improvement.
- ◯ Use feedback to identify areas for improvement and create an action plan to implement improvements.

Part B

Read the case study below and answer the questions that follow.

Case study

You work as part of the marketing team for a national chain of bakeries. Your organisation owns and operates 75 stores across the east coast of Australia. As part of its CSR (corporate social responsibility) strategy, your organisation has just agreed to sponsor a national charity that provides people in need with access to fresh and nutritious food. Both your organisation and the charity's headquarters are located in Melbourne. Your CEO has asked you to present to a number of different audiences, including all Victorian store managers, the board, the charity's senior management team and at a network event, to announce the sponsorship and how it will benefit the charity.

1. Determine the most appropriate forum and objectives for each presentation

2. Describe the tone, structure and style that would be most effective for each forum.

3. Describe the considerations you need to think of when preparing for the presentation at the Victorian store managers' meeting.