

# MIND TOOLS

Essential skills for an excellent career



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# The Mind Tools E-book

## Part II: Personal Productivity and Development Tools

This e-book is published by:

Mind Tools Limited

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ISBN 0-9545586-1-8.

7<sup>th</sup> Edition – February 2010

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## About the Author

James Manktelow founded MindTools.com in 1995. The concept for the site started with his research into the practical skills and techniques he needed to progress his own career – he found it frustrating that so many simple but important life and career skills were so little taught.

The Mind Tools site exists to correct this issue – our team now works with experts and specialists, spanning four continents, to bring you the best and most up-to-date career skills we can find.

Since 1999, more than 8,500,000 visitors have used the site to develop their careers. Many have been kind enough to send us enthusiastic testimonials saying how the techniques we have helped to popularize have helped them in their lives and their jobs.

As well as leading the Mind Tools team, James has written six books, including [Make Time for Success!](#) with Namita Anand, and [How to Lead](#) with Felix Brodbeck and Namita Anand.

In addition to working with Mind Tools, James' career has spanned strategic analysis, business development, marketing, production and project management, business and systems analysis, software development and consultancy for major corporations in several European countries. He has led teams at all corporate levels and, as an entrepreneur, he has worked with others to build two successful companies.

James holds an MBA from London Business School with specialties in entrepreneurship and strategy. He lives in the UK with his wife Rachel (also an LBS MBA) and son Alex.



'We are here to help you understand the simple, practical skills that will help you to excel, what ever you choose to do.'

James Manktelow, Mind Tools

### Acknowledgements

Thanks to the following people for their help and hard work on this project:

- Helena Smalman-Smith for editing and updating the latest version of this book; and
- My wife Rachel, for her help and professional advice during the writing of this e-book.

# How to use this e-book

Welcome to Mind Tools!

This e-book is a tool kit for your mind.

On its own, a screwdriver will only help you in a small way. Although it can be very useful, there are only a few jobs that you can use it for. When, however, you use this screwdriver as part of a complete tool kit, the range of options open to you is enormous. A craftsman with a good tool kit can make many different, useful things.

Similarly, individual thinking skills used on their own may help you in a small way. When, however, you use many different thinking skills together, your ability to solve problems increases significantly. Mind Tools is a tool kit of thinking techniques.

This e-book is divided into two parts. The first part of the book focuses on the tools you need to lead and manage others effectively. This begins with all-important Leadership skills, and then moves on to cover Problem Solving and Decision Making, giving you the skills you need to understand many difficult problems, and make the best decisions possible with the information available. The section on Project Planning shows you how to plan, schedule and implement complex projects, and the book ends with a section on Practical Creativity that shows you how to generate fresh and innovative ideas reliably.

The second part (this volume) covers techniques that will help you to develop your skills as a business thinker and make you more productive. This begins with individual sections that cover the time and stress management skills you will need as you become increasingly successful. They explain how to control and dissipate the pressures that will build around you. These tools will help you to live a happy life as well as a highly successful one.

Next, there are sections on the Information and Communication Skills that are so critical in today's workplace. Finally, the section on Memory Improvement explains useful ways of remembering people's names, lists of information, foreign languages, and so on.

The best way to use this e-book is to skim through it quickly so that you get an overview of what is contained within it. Then read through the sections that are useful to you in more detail, so that you remember the bones of the methods. Finally, keep Mind Tools on your PC desktop, and refer to it whenever you need a new approach to solving a problem. It will be worth skimming through it periodically to keep the range of tools you now have available fresh within your mind.

## Worksheets and Templates Supplement

This e-book is supplied with a free accompanying *Worksheets and Templates Supplement*. Wherever you see the 'Worksheet' or 'Template' symbols (shown below) in the text, you will find a Worksheet or Template for that tool in your *Worksheets and Templates Supplement*. Editable electronic copies of these can be downloaded by clicking links in the online versions of the articles at [www.mindtools.com](http://www.mindtools.com).

WorksheetTemplate

## Section 6: Time Management

- Beating Procrastination – Manage your time. Get it all done.
- How Good is Your Time Management?
- Activity Logs – Knowing where you waste it
- Action Plans – Starting to achieve, in a small way
- Prioritized To-Do Lists – Taking control of your time
- Action Programs – Becoming exceptionally well organized
- Prioritization – Making best use of your time and resources
- Scheduling Skills – Bringing your workload under control
- Personal Goal Setting – Planning to live your life your way
- Locke's Goal Setting Theory – Understanding SMART goal setting
- Golden Rules of Goal Setting – Five rules to set yourself up for success
- Backward Goal Setting – Using backward planning to set goals
- In Flow – Maximizing productivity through improved focus
- Leverage – Achieve much more with the same effort

## 6. Introduction to Time Management

### Work smarter. Take control of your workload.

Personal time management skills are essential skills for effective people. People who use these techniques routinely are the highest achievers in all walks of life, from business to sport to public service. If you use these skills well, then you will be able to function exceptionally well, even under intense pressure.

What's more, as you master these skills, you'll find that you take control of your workload, and say goodbye to the often intense stress of work overload.

At the heart of time management is an important shift in focus:

*Concentrate on results, not on being busy.*

Many people spend their days in a frenzy of activity, but achieve very little, because they're not concentrating their effort on the things that matter the most.

### The 80:20 Rule

This is neatly summed up in the Pareto Principle, or the '80:20 Rule'. This says that typically 80% of unfocussed effort generates only 20% of results. This means that the remaining 80% of results are achieved with only 20% of the effort. While the ratio is not always 80:20, this broad pattern of a small proportion of activity generating non-scalar returns recurs so frequently that it is the norm in many situations.

By applying the time management tips and skills in this section you can optimize your effort to ensure that you concentrate as much of your time and energy as possible on the high payoff tasks. This ensures that you achieve the greatest benefit possible with the limited amount of time available to you.

### Time Management Tools

In this section, we start off with simple and practical techniques, so that you can get off to a quick start in taking control of your time. The articles on Beating Procrastination and Activity Logs help you quickly eliminate the most common time-wasters, while the articles on Action Plans and Prioritized To-Do Lists teach simple techniques helping you focus on the most important short-term activities.

We then move onto the really powerful and life-changing technique of goal setting, and then look at the important, well-known, and usually-neglected technique of scheduling, which is fundamentally important if you're going to take control of your workload.

## 6.1 How Good is Your Time Management?

### Discover tools that can help you

How often do you find yourself running out of time? Weekly, daily, hourly? For many, it seems that there's just never enough time in the day to get everything done.

When you know how to manage your time you gain control. Rather than busily working here, there, and everywhere (and not getting much done anywhere), effective time management helps you to choose what to work on and when. This is essential if you're to achieve anything of any real worth.



We've put together an interactive Time Management Quiz to help you identify the aspects of time management that you need most help with. The results will point you to the specific tools you need to use to gain control of your time, and start working efficiently.

### How Good is Your Time Management?

**Instructions:** For each question, circle the number in the column that most applies.

Question	Not At All	Rarely	Some -times	Often	Very Often
1. Are the tasks you work on during the day the ones with the highest priority?	1	2	3	4	5
2. Do you find yourself completing tasks at the last minute, or asking for extensions?	5	4	3	2	1
3. Do you set aside time for planning and scheduling?	1	2	3	4	5
4. Do you know how much time you are spending on the various jobs you do?	1	2	3	4	5
5. How often do you find yourself dealing with interruptions?	5	4	3	2	1
6. Do you use goal setting to decide what tasks and activities you should work on?	1	2	3	4	5
7. Do you leave contingency time in your schedule to deal with 'the unexpected'?	1	2	3	4	5
8. Do you know whether the tasks you are working on are high, medium, or low value?	1	2	3	4	5
9. When you are given a new assignment, do you analyze it for importance and prioritize it accordingly?	1	2	3	4	5
10. Are you stressed about deadlines and commitments?	5	4	3	2	1
11. Do distractions often keep you from working on critical tasks?	5	4	3	2	1
12. Do you find you have to take work home, in order to get it done?	5	4	3	2	1
13. Do you prioritize your 'To Do' list or Action Program?	1	2	3	4	5
14. Do you regularly confirm your priorities with your boss?	1	2	3	4	5

Question	Not At All	Rarely	Some -times	Often	Very Often
15. Before you take on a task, do you check that the results will be worth the time put in?	1	2	3	4	5
<b>TOTAL</b> (Add up all the numbers you have circled)					

### Score Interpretation

Score	Comment
46-75	You're managing your time very effectively! Still, check the sections below to see if there's anything you can tweak to make this even better.
31-45	You're good at some things, but there's room for improvement elsewhere. Focus on the serious issues below, and you'll most likely find that work becomes much less stressful.
15-30	Ouch. The good news is that you've got a great opportunity to improve your effectiveness at work, and your long term success! However, to realize this, you've got to fundamentally improve your time management skills. Start below!

As you answered the questions, you probably had some insight into areas where your time management could use a pick-me-up. The following is a quick summary of the main areas of time management that were explored in the quiz, and a guide to the specific tools you can use for each.

#### Goal Setting (Questions 6, 10, 14, 15)

Your score out of 20 for these questions: \_\_\_\_\_

To start managing time effectively, you need to set goals. When you know where you're going, you can then figure out what exactly needs to be done, in what order. Without proper goal setting, you'll fritter your time away on a confusion of conflicting priorities.

People tend to neglect goal setting because it requires time and effort. What they fail to consider is that a little time and effort put in now saves an enormous amount of time, effort and frustration in the future. Mind Tools has two great articles on goal setting that are must-reads for everyone. If you are serious about time management, we suggest you start with [Personal Goal Setting](#) and [The Golden Rules of Goal Setting](#). We also recommend [Treasure Mapping](#).

#### Prioritization (Questions 1, 4, 8, 9, 13, 14, 15)

Your score out of 35 for these questions: \_\_\_\_\_

Prioritizing what needs to be done is especially important. Without it, you may work very hard, but you won't be achieving the results you desire because what you are working on is not of strategic importance.

Most people have a 'to-do' list of some sort. The problem with many of these lists is they are just a collection of things that need to get done. There is no rhyme or reason to the list and, because of this, the work they do is just as unstructured. So how do you work on To Do List tasks – top down, bottom up, easiest to hardest?

To work efficiently you need to work on the most important, highest value tasks. This way you won't get caught scrambling to get something critical done as the deadline approaches. For information on how to start prioritizing your tasks, see [Activity Logs](#), [Prioritized To Do Lists](#), [Prioritization](#), [The Action Priority Matrix](#), and [The Urgent/Important Matrix](#).

### **Managing Interruptions** (Questions 5, 9, 11, 12)

Your score out of 20 for these questions: \_\_\_\_\_

Having a plan and knowing how to prioritize it is one thing. The next issue is knowing what to do to minimize the interruptions you face during your day. It is widely recognized that managers get very little uninterrupted time to work on their priority tasks. There are phone calls, information requests, questions from employees, and a whole host of events that crop up unexpectedly. Some do need to be dealt with immediately, but others need to be managed. Two excellent tools that discuss how to minimize your interrupted time are [The Urgent/Important Matrix](#) and [Managing Interruptions](#).

**However**, some jobs need you to be available for people when they need help – interruption is a natural and necessary part of life. Here, do what you sensibly can to minimize it, but make sure you don't scare people away from interrupting you when they should.

### **Procrastination** (Questions 2, 10, 12)

Your score out of 15 for these questions: \_\_\_\_\_

'I'll get to it later' has led to the downfall of many a good employee. After too many 'laters' the work piles up so high that any task seems insurmountable. Procrastination is as tempting as it is deadly. The best way to beat it is to recognize that you do indeed procrastinate. Then you need to figure out why. Perhaps you are afraid of failing? (And some people are actually afraid of success!)

Once you know why you procrastinate then you can plan to get out of the habit. Reward yourself for getting jobs done, and remind yourself regularly of the horrible consequences of not doing those boring tasks! For more help on recognizing and overcoming procrastination see our guide to [Beating Procrastination](#).

### **Scheduling** (Questions 3, 7, 12)

Your score out of 15 for these questions: \_\_\_\_\_

Much of time management comes down to effective scheduling of your time. When you know what your goals and priorities are, you then need to know how to go about creating a schedule that keeps you on track, and protects you from stress.

This means understanding the factors that affect the time you have available for work. You not only have to schedule priority tasks, you have to leave room for interruptions, and contingency time for those unexpected events that otherwise wreak chaos with your schedule. By creating a robust schedule that reflects your priorities and well as supports your personal goals, you have a winning combination: One that will allow you to control your time and keep your life in balance. To learn specific scheduling skills, see our articles on [Pickle Jar Theory](#) and [Scheduling Skills](#).

### **Key Points**

Time management is an essential skill that helps you keep your work under control, at the same time that it helps you keep stress to a minimum.

We would all love to have an extra couple of hours in every day. Seeing as that is impossible, we need to work smarter on things that have the highest priority, and then creating a schedule that reflects our work and personal priorities.

With this in place, we can work in a focused and effective way, and really start achieving those goals, dreams and ambitions we care so much about.

## 6.2 Beating Procrastination

### Manage your time. Get it all done.

If you've found yourself putting off important tasks over and over again, you're not alone. In fact, many people procrastinate to some degree – but some are so chronically affected by procrastination that it stops them fulfilling their potential and disrupts their careers.

The key to controlling this destructive habit is to recognize when you start procrastinating, understand why it happens (even to the best of us), and take active steps to manage your time and outcomes better.

#### What is Procrastination?

In a nutshell, you procrastinate when you put off things that you should be focusing on right now, usually in favor of doing something that is more enjoyable or that you're more comfortable doing.

According to psychologist Professor Clarry Lay, a prominent writer on procrastination, procrastination occurs when there's "a temporal gap between intended behavior and enacted behavior." That is, procrastination is occurring when there's a significant time period between when people intend to do a job, and when they actually do it.

#### How to Overcome Procrastination

Follow these steps to deal with and control procrastination:

##### Step 1: Recognize That You're Procrastinating

If you're honest with yourself, you probably know when you're procrastinating. But to be sure, take our [Are You a Procrastinator?](#) self test.

Here are some useful indicators that will help you know when you're procrastinating:

- Filling your day with low priority tasks from your To Do List.
- Reading e-mails several times without starting work on them or deciding what you're going to do with them.
- Sitting down to start a high-priority task, and almost immediately going off to make a cup of coffee.
- Leaving an item on your To Do list for a long time, even though you know it's important.
- Regularly saying "Yes" to unimportant tasks that others ask you to do, and filling your time with these instead of getting on with the important tasks already on your list.
- Waiting for the "right mood" or the "right time" to tackle the important task at hand.

**Notes:**

Putting off an **unimportant** task isn't necessarily procrastination: it may just be good prioritization!

Putting off an important task for a short period because you're feeling particularly tired isn't necessarily procrastination either, so long as you don't delay starting the task for more than a day or so, and this is only an occasional event. If you have a genuine good reason for rescheduling something important, then you're not necessarily procrastinating. But if you're simply "making an excuse" because you really just don't want to do it, then you are.

In his 1986 article "At Last, My Research Article on Procrastination", published in the *Journal of Research on Personality*, Lay noted that procrastinatory behavior is independent of need for achievement, energy, or self-esteem. In other words, you may be a procrastinator even if you're confident in your own abilities, energetic, and enjoy achieving things.

**Step 2: Work Out WHY You're Procrastinating**

Why you procrastinate can depend on both you and the task. But it's important to understand which of the two is relevant in a given situation, so that you can select the best approach for overcoming your reluctance to get going.

One reason for procrastination is that people find a particular job **unpleasant**, and try to avoid it because of that. Most jobs have unpleasant or boring aspects to them, and often the best way of dealing with these is to get them over and done with quickly, so that you can focus on the more enjoyable aspects of the job.

Another cause is that people are **disorganized**. Organized people manage to fend off the temptation to procrastinate, because they will have things like [prioritized to-do lists](#) and [schedules](#) which emphasize how important the piece work is, and identify precisely when it's due. They'll also have planned how long a task will take to do, and will have worked back from that point to identify when they need to get started in order to avoid it being late. Organized people are also better placed to avoid procrastination, because they know how to break the work down into manageable "next steps".

Even if you're organized, you can **feel overwhelmed by the task**. You may doubt that you have the skills or resources you think you need, so you seek comfort in doing tasks you know you're capable of completing. Unfortunately, the big task isn't going to go away – truly important tasks rarely do. You may also fear success as much as failure. For example, you may think that success will lead to you being swamped with more requests to do this type of task, or that you'll be pushed to take on things that you feel are beyond you.

Surprisingly, **perfectionists** are often procrastinators, as they can tend to think "I don't have the right skills or resources to do this perfectly now, so I won't do it at all."

One final major cause of procrastination is having **underdeveloped decision-making skills**. If you simply can't decide what to do, you're likely to put off taking action in case you do the wrong thing.

**Step 3: Adopt Anti-Procrastination Strategies**

Procrastination is a habit – a deeply ingrained pattern of behavior. That means that you won't just break it overnight. Habits only stop being habits when you have **persistently** stopped practising them, so use as many approaches as possible to maximize your chances of beating procrastination. Some tips will work better for some people than for others, and for some tasks than others. And, sometimes, you may simply need to try a fresh approach to beat the "procrastination peril"!



These **general tips** will help **motivate** you to get moving:

- Make up your own rewards. For example, promise yourself a piece of tasty flapjack at lunchtime if you've completed a certain task. And make sure you notice how good it feels to finish things!
- Ask someone else to check up on you. Peer pressure works! This is the principle behind slimming and other self-help groups, and it is widely recognized as a highly effective approach.
- Identify the unpleasant consequences of NOT doing the task.
- Work out the [cost of your time](#) to your employer. As your employers are paying you to do the things that **they** think are important, you're not delivering value for money if you're not doing those things. Shame yourself into getting going!
- Aim to "[eat an elephant beetle](#)" first thing, every day!

If you're procrastinating because you're disorganized, here's how to **get organized!**

- Keep a [To-Do list](#) so that you can't "conveniently" forget about unpleasant or overwhelming tasks.
- Use an [Urgent/Important Matrix](#) to help prioritize your to-do list so that you can't try to kid yourself that it would be acceptable to put off doing something on the grounds that it's unimportant, or that you have many urgent things which ought to be done first when, in reality, you're procrastinating.
- Become a master of [scheduling](#) and [project planning](#), so that you know when to start those all-important projects.
- Set yourself time-bound [goals](#): that way, you'll have no time for procrastination!
- Focus on one task at a time.

If you're putting off starting a project because you find it **overwhelming**, you need to take a different approach. Here are some tips:

- Break the project into a set of smaller, more manageable tasks. You may find it helpful to create an [action plan](#).
- Start with some quick, small tasks if you can, even if these aren't the logical first actions. You'll feel that you're achieving things, and so perhaps the whole project won't be so overwhelming after all.

If you're procrastinating because you find the task **unpleasant**:

- Many procrastinators overestimate the unpleasantness of a task. So give it a try! You may find that it's not as bad as you thought!
- Hold the unpleasant consequences of **not** doing the work at the front of your mind.
- Reward yourself for doing the task.

Finally, if you're procrastinating because you **can't decide** what action to take, and are putting off making a decision because you're nervous about making the wrong choice, see our [decision-making section](#). This teaches a range of powerful and effective decision-making techniques.

Remember: the longer you can spend without procrastinating, the greater your chances of breaking this destructive habit for good!

## Key Points

To have a good chance of conquering procrastination, you need to spot straight away that you're doing it. Then, you need to identify why you're procrastinating and taken appropriate steps to overcome the block.

## 6.3 Activity Logs

A blue pill-shaped button with the word "Template" in white text.

### Finding out how you really spend your time

How long do you spend each day on unimportant things; Things that don't really contribute to your success at work? Do you KNOW how much time you've spent reading junk mail, talking to colleagues, making coffee and eating lunch? And how often have you thought, 'I could achieve so much more if I just had another half hour each day.'

And are you aware of when in the day you check your e-mail, write important articles or do your long-term planning?

Most people find they function at different levels of effectiveness at different times of day as their energy levels fluctuate. Your effectiveness may vary depending on the amount of sugar in your blood, the length of time since you last took a break, routine distractions, stress, discomfort, or a range of other factors.

Activity logs help you to analyze how you actually spend your time. The first time you use an activity log you may be shocked to see the amount of time that you waste! Memory is a very poor guide when it comes to this, as it can be too easy to forget time spent on non-core tasks.

### How to Use the Tool

Keeping an Activity Log for several days helps you to understand how you spend your time, and when you perform at your best. Without modifying your behavior any further than you have to, note down the things you do as you do them on our Activity Log template which can be found in your *Worksheets and Templates Supplement* or can be downloaded [here](#). Every time you change activities, whether opening mail, working, making coffee, gossiping with colleagues or whatever, note down the time of the change.

As well as recording activities, note how you feel, whether alert, flat, tired, energetic, etc. Do this periodically throughout the day. You may decide to integrate your activity log with a [stress diary](#).

### Learning from Your Log

Once you have logged your time for a few days, analyze your daily activity log. You may be alarmed to see the amount of time you spend doing low value jobs!

You may also see that you are energetic in some parts of the day, and flat in other parts. A lot of this can depend on the rest breaks you take, the times and amounts you eat, and quality of your nutrition. The activity log gives you some basis for experimenting with these variables.

Your analysis should help you to free up extra time in your day by applying one of the following actions to most activities:

- Eliminate jobs that your employer shouldn't be paying you to do. These may include tasks that someone else in the organization should be doing, possibly at a lower pay rate, or personal activities such as sending non-work e-mails.

- Schedule your most challenging tasks for the times of day when your energy is highest. That way your work will be better and it should take you less time.
- Try to minimize the number of times a day you switch between types of task. For example, read and reply to e-mails in blocks once in the morning and once in the afternoon only.
- Reduce the amount of time spent on legitimate personal activities such as making coffee (take turns in your team to do this – it saves time and strengthens team spirit).

### Key Points

Activity logs are useful tools for auditing the way that you use your time. They can also help you to track changes in your energy, alertness and effectiveness throughout the day.

By analyzing your activity log you will be able to identify and eliminate time-wasting or low-yield jobs. You will also know the times of day at which you are most effective, so that you can carry out your most important tasks during these times.

## 6.4 To-Do Lists

A blue button with rounded corners and a slight gradient, containing the word "Template" in white, bold, sans-serif font.

### The key to efficiency

Do you frequently feel overwhelmed by the amount of work you have to do? Do you face a constant barrage of looming deadlines? Or do you sometimes just forget to do something important, so that people have to chase you to get work done?

All of these are symptoms of not keeping a proper 'To-Do List'. To-Do Lists are prioritized lists of all the tasks that you need to carry out. They list everything that you have to do, with the most important tasks at the top of the list, and the least important tasks at the bottom.

While this sounds a simple thing to do, it's when people start to use To-Do Lists properly that they often make their first personal productivity/[time management](#) breakthrough, and start to make a real success of their careers.

By keeping a To-Do List, you make sure that you capture all of the tasks you have to complete in one place. This is essential if you're not going to forget things. And by prioritizing work, you plan the order in which you'll do things, so you can tell what needs your immediate attention, and what you can quietly forget about until much, much later. This is essential if you're going to beat work overload. Without To-Do Lists, you'll seem dizzy, unfocused and unreliable to the people around you. With To-Do Lists, you'll be much better organized, and will seem much more reliable. This is very important!

### Preparing a To-Do List

Before you start preparing your To-Do List, first print a copy of our To Do List template from your Worksheets and Templates Supplement or download an editable pdf [here](#).

Then start by writing down all of the tasks that you need to complete, and if they are large, break them down into their component elements. If these still seem large, break them down again. Do this until you have listed everything that you have to do, and until tasks are will take no more than 1-2 hours to complete. This may be a huge and intimidating list, but our next step makes it manageable!

Next, run through these jobs allocating priorities from A (very important, or very urgent) to F (unimportant, or not at all urgent). If too many tasks have a high priority, run through the list

again and demote the less important ones. Once you have done this, rewrite the list in priority order.

You will then have a precise plan that you can use to eliminate the problems you face. You will be able to tackle these in order of importance or urgency. This allows you to separate important jobs from the many time-consuming trivial ones.

**Tip:**

Once you're comfortable with use of To-Do Lists, you need to start differentiating between urgency and importance. For more on this, see our article on the [Urgent/Important Matrix](#).

### Using Your To-Do Lists

Different people use To-Do Lists in different ways in different situations: if you are in a sales-type role, a good way of motivating yourself is to keep your list relatively short and aim to complete it every day.

In an operational role, or if tasks are large or dependent on too many other people, then it may be better to keep one list and 'chip away' at it.

It may be that you carry unimportant jobs from one To-Do List to the next. You may not be able to complete some very low priority jobs for several months. Only worry about this if you need to – if you are running up against a deadline for them, raise their priority.

If you have not used To-Do Lists before, try them now: They are one of the keys to being really productive and efficient.

### Key Points

Prioritized To-Do Lists are fundamentally important to efficient work. If you use To-Do Lists, you will ensure that:

- You remember to carry out all necessary tasks
- You tackle the most important jobs first, and do not waste time on trivial tasks.
- You do not get stressed by a large number of unimportant jobs.
- To draw up a Prioritized To-Do List, download our [template](#) and use it to list all the tasks you must carry out. Mark the importance of the task next to it, with a priority from A (very important) to F (unimportant). Redraft the list into this order of importance.

Now carry out the jobs at the top of the list first. These are the most important, most beneficial tasks to complete.

## 6.5 Action Programs

### Becoming exceptionally well organized

You are probably familiar with the idea of 'To-Do Lists.'

To-Do Lists are great for managing a small number of tasks. The problem is that, for most of us, our To-Do List is not really a planned, focused action list. Rather, it is a sort of a catch-all for a lot of things that are unresolved and not yet translated into outcomes.

Specific entries, such as 'Call Tina,' exist along with vaguer aspirations, such as 'Get started on house painting project.' Often, the real actionable details of what the list-maker has 'to do' are actually missing. (Take, for instance, the house painting project: more precise entries would be choose color scheme, buy paints, and so on.)

What this means is that you tend to do the specific tasks, and fail to make progress with the big, important projects. And even if you do get beyond the quick actions, having a complete project as a 'to do' can lead you to focus all of your attention on it. This makes multi-tasking difficult.

This can be a serious problem in a job where you need to make progress on many different projects at the same time – and this is exactly the situation most senior managers find themselves in.

This is where Action Programs are useful. Action Programs are 'industrial strength' versions of To-Do Lists.

Because they incorporate short-, medium- and long-term goals, they allow you to plan your time, without forgotten commitments coming in to blow your schedule apart. Because priorities are properly thought through, you'll be focusing on the things that matter, and not frittering your time away on low value activities. And because they support delegation, they help you get into the habit of delegating jobs where you can. All of this lets **you save time – and get away on time** – whilst also significantly increasing your effectiveness and productivity.

### How to Use the Tool

Follow this four-step procedure to create your Action Program:

#### Step 1. Collection

First, make a list inventory of all the things in your world that require resolution. Try to collect and write down everything – urgent or not, big or small, personal or professional – that you feel is incomplete and needs action from you to get completed.

To an extent, this collection is taking place automatically. E-mail requests are getting stored in your email account, memos demanding attention are being delivered to your in-tray, mail is reaching your mailbox and messages asking for action are accumulating on your voice mail.

But there is other stuff – stuff that is idling in your head, projects you want to run, things you intend to deal with lying at the bottom of the drawer, ideas written down on stray bits of paper – that need to be gathered and put in place too. Bring all of these actions and projects together and inventory them in one place.

And – this is really important – make sure that your [personal goals](#) are brought onto this list.

#### Tip 1:

You can experience tremendous stress if you have too many mental 'To Dos' floating around in your head. You never know whether you've forgotten things, and you always have that terrible feeling of not having achieved everything you want to achieve.

By writing down everything on your Action Program, you can empty your mind of these stressful reminders and make sure you prioritize these actions coherently and consistently. This has the incidental benefit of helping you improve your concentration, simply because you do not have these distractions buzzing around your mind.



**Tip 2:**

The first time you create your Action Program, you're going to spend a while – maybe two hours – putting it together. This is the up front cost of organizing your life. However, once you've done it, you'll be amazed at how much more in control you feel. Also, it will take relatively little effort to keep your Program up-to-date after this.

**Tip 3:**

You'll find it easiest if you keep your Action Program on your computer as a word processor document. This will make it easy to put together, update and maintain on a routine basis without a lot of tedious redrafting.

**Step 2. Pruning**

Now, process the list you made in step 1, by looking carefully at each item.

Decide whether you should, actually, take action on it. A lot of what comes our way has no real relevance to us, or is really not important in the scale of things. If that is the case, then delete these things from your inventory.

**Step 3. Organizing and Prioritizing**

This comes in three parts.

**First of all**, review your inventory of items. For any which are separate, individual actions that make up part of a larger project, group these individual actions together into their projects.

For example, at home, you may want to improve your bathroom, and repaint your living room: these can go into a 'Home Renovation' project. At work, you may be providing input into the requirements for a new computer system, and may be expected to test and then train your team on this system at a point in the future: all of these go into a 'computer system' project.

What you'll find is that once you start, items will almost seem to 'organize themselves' into coherent projects.

You also need to make sure that your personal goals are included as individual projects.

**Second**, review these projects, and allocate a priority to them (for example, by coding them from A to F) depending on their importance. Clearly, your personal goals are exceptionally important projects!

**Third**, insert your projects into a formatted Action Program.

The Action Program is split up into three parts:

1. A 'Next Action List,' which shows the small next actions that you will take to move your projects forward.
2. A 'Delegated Actions List,' which shows projects and actions have delegated to other people.
3. A 'Project Catalog' that shows all of the projects you are engaged in and the small individual tasks that you have identified so far that contribute to them.

The great news is that, by this stage, you've already created the largest part of this: the **Project Catalog!** This is the list of prioritized projects and activities that you've just completed.

Typically, the Project Catalog is at the back of the Action Program, as it's often only referred to during a weekly review process.

Next, create the **Delegated Actions List** by working through your Project Catalog, and identifying tasks that you've delegated. Record these under the name of the person who you've delegated the activity to, along with the checkpoints you've agreed.

**Tip:**

If you haven't yet delegated anything, or you haven't yet agreed checkpoints, don't worry! What we're doing here is creating the right framework – you'll have plenty of time to use this framework properly!

Typically, the Delegated Actions List sits in front of the Project Catalog in your Action Program document, as it's referred to quite often.

Finally, create your **Next Action List** by working through the projects to which you've given the highest priority – the projects that you want and need to move forward on straight away – and extracting the small, logical next actions for these projects.

The Next Action List goes on the front page of your Action Program, as you'll refer to it many times a day.

**Tip 1:**

If the Next Action is going to take less than a couple of minutes, then why not do it right away? Make sure, though, that you come back and complete your Action Program!

**Tip 2:**

It's this selection of appropriate next actions that takes a certain amount of judgment. If one of your projects is of over-riding importance, then have several Next Actions from this project on your list, and keep other Next Actions to a bare minimum. However, if you need to keep a lot of projects 'simmering away', have Next Actions from each on your list.

**Tip 3:**

Keep your Next Actions small and achievable, ideally taking no more than a couple of hours to complete. This helps you keep momentum up on projects and strongly enhances your sense of having had a productive, successful day.

If Next Actions are larger than this, break them down. For example, if your Next Action is to write an article, break this down into research, planning, writing, fact-checking and editing phases. Then make the research phase your Next Action, and put the rest of the stages in your project catalog.

**Tip 4:**

Where you have several Next Actions, prioritize them from A to F, depending on their importance, value, urgency and relevance to your goals.

Then monitor your success in dealing with these actions. If you find that actions are 'stagnating' on your list, consider whether you should either cancel these projects, or whether you should raise their priority so that you deal with them.

Whatever you do, make sure you don't have too many actions on your Next Action List.

**Tip 5:**

As you work through this process, ask yourself if there are any tasks that you can delegate or, if appropriate, get help with. As you identify these, put these on your Next Action List, with the action being to delegate the task.

When you've delegated the task, move it onto your Delegated Actions List, along with the checkpoint times and dates you've agreed.

Now review the Next Action List. If it is too cluttered, move some of the less urgent/important jobs back into the project catalog. If it is thin and under-challenging, pull up some more Next Actions from the Project Catalog.

Also, it makes sense to prioritize the items (for example, from A-C) in the Next Action List so you know what to focus on (it's unlikely you'll have any Actions with a priority lower than C on your Next Action List).

**Step 4. 'Working' Your Action Program**

An Action Program is typically fairly long. But you don't have to run through the entire Program every day!

Usually, you'll only be dealing with the top page or pages. Some activities may be day-specific or time-specific. Depending of the way you work, these can be either maintained as the top page of your Action Program or marked on your calendar.

In effect, these pages are just a new form of your old To-Do List. It is just that only specific short actions are outlined here, while the major projects to which the actions belong are stored in your Project Catalog.

What you must do, however, is review your Action Program periodically, for example, every week (put time for this in your schedule). Delete or archive items you've completed, move items from the Project Catalog to the front pages as you make progress on your project, and add any new actions that have come your way.

**Key Points**

The Action Program is an 'industrial strength' version of the To-Do List. It helps you to process the projects you want to run into actionable activities, and then manage them within a three-tier structure.

The 'Next Action List' heading lists the precise, immediate actions that you need to perform to move your projects forwards.

The 'Delegated Actions List' records details of the projects and actions you have delegated.

The 'Project Catalog' heading lists the projects that you want to work on, along with other actions non-urgent you have gathered that will contribute to the completion of these projects.

This approach helps you maintain focus on daily jobs and long-term goals at the same time, and it means that you always have a plan for 'next action' at any moment. This puts you in control, and also gives you a real sense of achievement.

More than this, this approach helps you to multi-task effectively, helping you to manage and progress many projects simultaneously. This is particularly important as you progress your career, and as the jobs you take on become increasingly complex and challenging.

## 6.6 Prioritization

### Making best use of your time and resources

Prioritization is the essential skill you need to make the very best use of your own efforts and those of your team.

It is particularly important when time is limited and demands are seemingly unlimited. It helps you to allocate your time where it is most-needed and most wisely spent, freeing you and your team up from less important tasks that can be attended to later. or quietly dropped.

With good prioritization (and careful management of deprioritized tasks) you can bring order to chaos, massively reduce stress, and move towards a successful conclusion. Without it, you'll flounder around, drowning in competing demands.

#### Simple Prioritization

At a simple level, you can prioritize based on time constraints, on the potential profitability or benefit of the task you're facing, or on the pressure you're under to complete a job:

- Prioritization based on project value or profitability is probably the most commonly-used and rational basis for prioritization. Whether this is based on a subjective guess at value or a sophisticated financial evaluation, it often gives the most efficient results.
- Time constraints are important where other people are depending on you to complete a task, and particularly where this task is on the critical path of an important project. Here, a small amount of your own effort can go a very long way.
- And it's a brave (and maybe foolish) person who resists his or her boss's pressure to complete a task, when that pressure is reasonable and legitimate.

#### Prioritization Tools

While these simple approaches to prioritization suit many situations, there are plenty of special cases where you'll need other prioritization and [time management](#) tools if you're going to be truly effective. We look at some of these below:

While these simple approaches to prioritization suit many situations, there are plenty of special cases where you'll need other tools if you're going to be truly effective. We look at some of these below:

##### 1. Paired Comparison Analysis:

Paired Comparison Analysis is most useful where decision criteria are vague, subjective or inconsistent. It helps you prioritize options by asking you to compare each item on a list with all other items on the list individually. By deciding in each case which of the two is

most important, you can consolidate results to get a prioritized list. Click [here](#) to find out more about [Paired Comparison Analysis](#).

**2. Grid Analysis:**

Grid Analysis helps you prioritize a list of tasks where you need to take many different factors into consideration. Click [here](#) to learn how to use it.

**3. The Action Priority Matrix:**

This quick and simple diagramming technique asks you to plot the value of the task against the effort it will consume.

By doing this you can quickly spot the 'quick wins' which will give you the greatest rewards in the shortest possible time, and avoid the 'hard slogs' which soak up time for little eventual reward. This is an ingenious approach for making highly efficient prioritization decisions. Click [here](#) to find out more.

**4. The Urgent/Important Matrix:**

Similar to the Action Priority Matrix, this technique asks you to think about whether tasks are urgent or important.

Frequently, seemingly urgent tasks actually aren't that important. And often, really important activities (like working towards your life goals) just aren't that urgent. This approach helps you cut through this. Click [here](#) to find out more.

**5. The Ansoff and Boston Matrices:**

These give you quick 'rules of thumb' for prioritizing the opportunities open to you.

The Ansoff Matrix helps you evaluate and prioritize opportunities by risk. The Boston Matrix does a similar job, helping you prioritize opportunities based on the attractiveness of a market and your ability to take advantage of it.

For more information on the [Ansoff Matrix](#), click [here](#): And for the [Boston Matrix](#), see [here](#).

**6. Pareto Analysis:**

Where you're facing a flurry of problems needing to be solved, Pareto Analysis helps you identify the most important changes to make.

It firstly asks you to group together the different types of problem you face, and then asks you to count the number of cases of each type of problem. By prioritizing the most common type of problem, you can focus your efforts on resolving it. This clears time to focus on the next set of problems, and so on.

For more information on [Pareto Analysis](#), click [here](#).

**7. Nominal Group Technique:**

Nominal Group Technique is a useful technique for prioritizing issues and projects within a group, giving everyone fair input into the prioritization process. This is particularly useful where consensus is important, and where a robust group decision needs to be made.

Using this tool, each group participant 'nominates' his or her priority issues, and then ranks them on a scale, of say 1 to 10. The score for each issue is then added up, with issues then prioritized based on scores. The obvious fairness of this approach makes it particularly useful where prioritization is based on subjective criteria, and where people's 'buy in' to the prioritization decision is needed.



To learn more about the [Nominal Group Technique](#) and how you and your team can use it to prioritize issues and projects, click [here](#).

## 6.7 Effective Scheduling

**Plan your time. Make time for yourself.**

So far in this section of Mind Tools, we have looked at your [priorities](#) and your [goals](#) – these define what you aspire to do with your time. Scheduling is where these aspirations meet reality.

Scheduling is the process by which you look at the time available to you, and plan how you will use it to achieve the goals you have identified. By using a schedule properly, you can:

- Understand what you can realistically achieve with your time;
- Plan to make the best use of the time available;
- Leave enough time for things you absolutely must do;
- Preserve contingency time to handle 'the unexpected'; and
- Minimize [stress](#) by avoiding over-commitment to others.

A well thought-through schedule allows you to manage your commitments, while still leaving you time to do the things that are important to you. It is therefore your most important weapon for beating work overload.

### How to Use the Tool

Scheduling is best done on a regular basis, for example at the start of every week. Go through the following steps in preparing your schedule:

1. Start by identifying the time you want to make available for your work. This will depend on the design of your job and on your personal goals in life.
2. Next, block in the actions you absolutely must take to do a good job. These will often be the things you are assessed against.

For example, if you manage people, then you must make time available for coaching, supervision, and dealing with issues that arise. Similarly, you must allow time to communicate with your boss and key people around you. (While people may let you get away with 'neglecting them' in the short-term, your best time management efforts will surely be derailed if you do not set aside time for those who are important in your life.)

3. Review your [To Do List](#), and schedule in the [high-priority, urgent](#) activities, as well as the essential maintenance tasks that cannot be delegated and cannot be avoided.
4. Next, block in appropriate contingency time. You will learn how much of this you need by experience. Normally, the more unpredictable your job, the more contingency time you need. The reality of many people's work is of constant [interruption](#): Studies show some managers getting an average of as little as six minutes uninterrupted work done at a time.

Obviously, you cannot tell when interruptions will occur. However, by leaving space in your schedule, you give yourself the flexibility to rearrange your schedule to react effectively to urgent issues.

5. What you now have left is your 'discretionary time': the time available to deliver your priorities and achieve your goals. Review your Prioritized To Do List and [personal goals](#), evaluate the time needed to achieve these actions, and schedule them in.

By the time you reach step 5, you may find that you have little or no discretionary time available. If this is the case, then revisit the assumptions you used in the first four steps. Question whether things are absolutely necessary, whether they can be delegated, or whether they can be done in an abbreviated way.

Remember that one of the most important ways people learn to achieve success is by maximizing the 'leverage' they can achieve with their time. They increase the amount of work they can manage by delegating work to other people, spending money outsourcing key tasks, or using technology to automate as much of their work as possible. This frees them up to achieve their goals.

Also, use this as an opportunity to review your [To Do List](#) and [Personal Goals](#). Have you set goals that just aren't achievable with the time you have available? Are you taking on too many additional duties? Or are you treating things as being more important than they really are?

If your discretionary time is still limited, then you may need to renegotiate your workload. With a well-thought through schedule as evidence, you may find this surprisingly easy.

### Key Points

Scheduling is the process by which you plan your use of time. By scheduling effectively, you can reduce stress and maximize your effectiveness. This makes it one of the most important [time management](#) skills you can use.

Before you can schedule efficiently, you need an effective scheduling system. This can be a diary, calendar, paper-based organizer, PDA or a software package like MS Outlook. The best solution depends entirely on your circumstances.

Scheduling is then a five-step process:

1. Identify the time you have available.
2. Block in the essential tasks you must carry out to succeed in your job.
3. Schedule in high priority urgent tasks and vital 'house-keeping' activities.
4. Block in appropriate contingency time to handle unpredictable interruptions.
5. In the time that remains, schedule the activities that address your priorities and personal goals.

If you have little or no discretionary time left by the time you reach step five, then revisit the assumptions you have made in steps one to four.

## 6.8 Personal Goal Setting

**Find direction. Live your life your way.**

Goal setting is a powerful process for thinking about your ideal future, and for motivating yourself to turn this vision of the future into reality.

The process of setting goals helps you choose where you want to go in life. By knowing precisely what you want to achieve, you know where you have to concentrate your efforts. You'll also quickly spot the distractions that would otherwise lure you from your course.

More than this, properly-set goals can be incredibly motivating, and as you get into the habit of setting and achieving goals, you'll find that your self-confidence builds fast.

## Achieving More with Focus

Goal setting techniques are used by top-level athletes, successful business-people and achievers in all fields. They give you long-term vision and short-term motivation. They focus your acquisition of knowledge and help you to organize your time and your resources so that you can make the very most of your life.

By setting sharp, clearly defined goals, you can measure and take pride in the achievement of those goals. You can see forward progress in what might previously have seemed a long pointless grind. By setting goals, you will also raise your self-confidence, as you recognize your ability and competence in achieving the goals that you have set.

## Starting to Set Personal Goals

Goals are set on a number of different levels: First you create your 'big picture' of what you want to do with your life, and decide what large-scale goals you want to achieve. Second, you break these down into the smaller and smaller targets that you must hit so that you reach your lifetime goals. Finally, once you have your plan, you start working to achieve it.

We start this process with your Lifetime Goals, and work down to the things you can do today to start moving towards them.

## Your Lifetime Goals

The first step in setting personal goals is to consider what you want to achieve in your lifetime (or by a time at least, say, 10 years in the future) as setting Lifetime Goals gives you the overall perspective that shapes all other aspects of your decision making.

To give a broad, balanced coverage of all important areas in your life, try to set goals in some of these categories (or in categories of your own, where these are important to you):

### **Artistic:**

Do you want to achieve any artistic goals? If so, what?

### **Attitude:**

Is any part of your mindset holding you back? Is there any part of the way that you behave that upsets you? If so, set a goal to improve your behavior or find a solution to the problem.

### **Career:**

What level do you want to reach in your career?

### **Education:**

Is there any knowledge you want to acquire in particular? What information and skills will you need to achieve other goals?

### **Family:**

Do you want to be a parent? If so, how are you going to be a good parent? How do you want to be seen by a partner or by members of your extended family?

**Financial:**

How much do you want to earn by what stage?

**Physical:**

Are there any athletic goals you want to achieve, or do you want good health deep into old age? What steps are you going to take to achieve this?

**Pleasure:**

How do you want to enjoy yourself? You should ensure that some of your life is for you!

**Public Service:**

Do you want to make the world a better place? If so, how?

Spend some time [brainstorming](#) these, and then select one goal in each category that best reflects what you want to do. Then consider trimming again so that you have a small number of really significant goals on which you can focus.

As you do this, make sure that the goals that you have set are ones that you genuinely want to achieve, not ones that your parents, family, or employers might want (if you have a partner, you probably want to consider what he or she wants, however make sure you also remain true to yourself!)

**Starting to Achieve Your Lifetime Goals**

Once you have set your lifetime goals, set a 25 year plan of smaller goals that you should complete if you are to reach your lifetime plan. Then set a 5 year plan, 1 year plan, 6 month plan, and 1 month plan of progressively smaller goals that you should reach to achieve your lifetime goals. Each of these should be based on the previous plan.

Then create a [daily to-do list](#) of things that you should do today to work towards your lifetime goals. At an early stage these goals may be to read books and gather information on the achievement of your goals. This will help you to improve the quality and realism of your goal setting.

Finally review your plans, and make sure that they fit the way in which you want to live your life.

**Staying on Course**

Once you have decided your first set of plans, keep the process going by reviewing and updating your to-do list on a daily basis. Periodically review the longer term plans, and modify them to reflect your changing priorities and experience.

**Goal Setting Tips**

The following broad guidelines will help you to set effective goals:

- *State each goal as a positive statement:* Express your goals positively – ‘Execute this technique well’ is a much better goal than ‘Don’t make this stupid mistake.’
- *Be precise:* Set a precise goal, putting in dates, times and amounts so that you can measure achievement. If you do this, you will know exactly when you have achieved the goal, and can take complete satisfaction from having achieved it.

- *Set priorities:* When you have several goals, give each a priority. This helps you to avoid feeling overwhelmed by too many goals, and helps to direct your attention to the most important ones.
- *Write goals down:* This crystallizes them and gives them more force.
- *Keep operational goals small:* Keep the low-level goals you are working towards small and achievable. If a goal is too large, then it can seem that you are not making progress towards it. Keeping goals small and incremental gives more opportunities for reward. Derive today's goals from larger ones.
- *Set performance goals, not outcome goals:* You should take care to set goals over which you have as much control as possible. There is nothing more dispiriting than failing to achieve a personal goal for reasons beyond your control. In business, these could be bad business environments or unexpected effects of government policy. In sport, for example, these reasons could include poor judging, bad weather, injury, or just plain bad luck. If you base your goals on personal performance, then you can keep control over the achievement of your goals and draw satisfaction from them.
- *Set realistic goals:* It is important to set goals that you can achieve. All sorts of people (employers, parents, media, society) can set unrealistic goals for you. They will often do this in ignorance of your own desires and ambitions. Alternatively you may set goals that are too high, because you may not appreciate either the obstacles in the way or understand quite how much skill you need to develop to achieve a particular level of performance.

**SMART Goals:**

A useful way of making goals more powerful is to use the SMART mnemonic. While there are plenty of variants, SMART usually stands for:

- S** Specific
- M** Measurable
- A** Attainable
- R** Relevant
- T** Time-bound

For example, instead of having 'to sail around the world' as a goal, it is more powerful to say 'To have completed my trip around the world by December 31, 2015.' Obviously, this will only be attainable if a lot of preparation has been completed beforehand!

**Achieving Goals**

When you have achieved a goal, take the time to enjoy the satisfaction of having done so. Absorb the implications of the goal achievement, and observe the progress you have made towards other goals. If the goal was a significant one, reward yourself appropriately. All of this helps you build the [self-confidence](#) you deserve!

With the experience of having achieved this goal, review the rest of your goal plans:

- If you achieved the goal too easily, make your next goals harder.
- If the goal took a dispiriting length of time to achieve, make the next goals a little easier.
- If you learned something that would lead you to change other goals, do so.
- If you noticed a deficit in your skills despite achieving the goal, decide whether to set goals to fix this.

Failure to meet goals does not matter much, as long as you learn from it. Feed lessons learned back into your goal setting program.

Remember too that your goals will change as time goes on. Adjust them regularly to reflect growth in your knowledge and experience, and if goals do not hold any attraction any longer, then let them go.

### Key Points

Goal setting is an important method of:

- Deciding what is important for you to achieve in your life;
- Separating what is important from what is irrelevant, or a distraction;
- Motivating yourself; and
- Building your self-confidence, based on successful achievement of goals.

If you don't already set goals, do so, starting now. As you make this technique part of your life, you'll find your career accelerating, and you'll wonder how you did without it!

## 6.9 Locke's Goal Setting Theory

### Understanding SMART goal setting

Goal setting is a powerful way of motivating people. The value of goal setting is so well recognized that entire management systems, like [Management by Objectives](#), have goal setting basics incorporated within them.

In fact, goal setting theory is generally accepted as among the most valid and useful motivation theories in industrial and organizational psychology, human resource management, and organizational behavior.

Many of us have learned – from bosses, seminars, and business articles – to set [SMART](#) goals. It seems natural to assume that by setting a goal that's Specific, Measurable, Attainable, Relevant, and Time-bound, we will be well on our way to accomplishing it.

#### But is this really the best way of setting goals?

To answer this, we look to Dr Edwin Locke's pioneering research on goal setting and motivation in the late 1960s. In his 1968 article 'Toward a Theory of Task Motivation and Incentives,' he stated that employees were motivated by clear goals and appropriate feedback. Locke went on to say that working toward a goal provided a major source of motivation to actually reach the goal – which, in turn, improved performance.

This information does not seem revolutionary to most of us some 40 years later. This shows the impact his theory has had on professional and personal performance.

In this article, we look at what Locke had to say about goal setting, and how we can apply his theory to our own performance goals.

### Goal Setting Theory

Locke's research showed that there was a relationship between how difficult and specific a goal was and people's performance of a task. He found that specific and difficult goals led to better task performance than vague or easy goals.



Telling someone to 'Try hard' or 'Do your best' is less effective than 'Try to get more than 80% correct' or 'Concentrate on beating your best time.' Likewise, having a goal that's too easy is not a motivating force. Hard goals are more motivating than easy goals, because it's much more of an accomplishment to achieve something that you have to work for.

A few years after Locke published his article, another researcher, Dr Gary Latham, studied the effect of goal setting in the workplace. His results supported exactly what Locke had found, and the inseparable link between goal setting and workplace performance was formed.

In 1990, Locke and Latham published their seminal work, 'A Theory of Goal Setting and Task Performance.' In this book, they reinforced the need to set specific and difficult goals, and they outlined three other characteristics of successful goal setting.

### **Five Principles of Goal Setting**

To motivate, goals must take into consideration the degree to which each of the following exists:

1. Clarity
2. Challenge
3. Commitment
4. Feedback
5. Task complexity

Let's look at each of these in detail.

#### **1. Clarity**

Clear goals are measurable, unambiguous, and behavioral. When a goal is clear and specific, with a definite time set for completion, there is less misunderstanding about what behaviors will be rewarded. You know what's expected, and you can use the specific result as a source of motivation. When a goal is vague – or when it's expressed as a general instruction, like 'Take initiative' – it has limited motivational value.

To improve your or your team's performance, set clear goals that use specific and measurable standards. 'Reduce job turnover by 15%' or 'Respond to employee suggestions within 48 hours' are examples of clear goals.

When you use the SMART acronym to help you set goals, you ensure the clarity of the goal by making it Specific, Measurable and Time-bound.

#### **2. Challenge**

One of the most important characteristics of goals is the level of challenge. People are often motivated by achievement, and they'll judge a goal based on the significance of the anticipated accomplishment. When you know that what you do will be well received, there's a natural motivation to do a good job.

Rewards typically increase for more difficult goals. If you believe you'll be well compensated or otherwise rewarded for achieving a challenging goal, that will boost your enthusiasm and your drive to get it done.

Setting SMART goals that are Relevant links closely to the rewards given for achieving challenging goals. Relevant goals will further the aims of your organization, and these are the kinds of goals that most employers will be happy to reward.

When setting goals, make each goal a challenge. If an assignment is easy and not viewed as very important – and if you or your employee doesn't expect the accomplishment to be significant – then the effort may not be impressive.

**Note:**

It's important to strike an appropriate balance between a challenging goal and a realistic goal. Setting a goal that you'll fail to achieve is possibly more de-motivating than setting a goal that's too easy. The need for success and achievement is strong, therefore people are best motivated by challenging, but realistic, goals. Ensuring that goals are Achievable or Attainable is one of the elements of SMART.

**3. Commitment**

Goals must be understood and agreed upon if they are to be effective. Employees are more likely to 'buy into' a goal if they feel they were part of creating that goal. The notion of participative management rests on this idea of involving employees in setting goals and making decisions.

One version of SMART – for use when you are working with someone else to set their goals – has A and R stand for Agreed and Realistic instead of Attainable and Relevant. Agreed goals lead to commitment.

This doesn't mean that every goal has to be negotiated with and approved by employees. It does mean that goals should be consistent and in line with previous expectations and organizational concerns. As long as the employee believes the goal is consistent with the goals of the company, and believes the person assigning the goal is credible, then the commitment should be there.

Interestingly, goal commitment and difficulty often work together. The harder the goal, the more commitment is required. If you have an easy goal, you don't need a lot of motivation to get it done. When you're working on a difficult assignment, you will likely encounter challenges that require a deeper source of inspiration and incentive.

As you use goal setting in your workplace, make an appropriate effort to include people in their own goal setting. Encourage employees to develop their own goals, and keep them informed about what's happening elsewhere in the organization. This way, they can be sure that their goals are consistent with the overall vision and purpose that the company seeks.

**4. Feedback**

In addition to selecting the right type of goal, an effective goal program must also include feedback. Feedback provides opportunities to clarify expectations, adjust goal difficulty, and gain recognition. It's important to provide benchmark opportunities or targets, so individuals can determine for themselves how they're doing.

These regular progress reports, which measure specific success along the way, are particularly important where it's going to take a long time to reach a goal. In these cases, break down the goals into smaller chunks, and link feedback to these intermediate milestones.

SMART goals are Measurable, and this ensures that clear feedback is possible.

With all your goal setting efforts, make sure that you build in time for providing formal feedback. Certainly, informal check-ins are important, and they provide a means of giving regular encouragement and recognition. However, taking the time to sit down and discuss goal performance is a necessary factor in long-term performance improvement. See our article on Delegation for more on this.

## 5. Task Complexity

The last factor in goal setting theory introduces two more requirements for success. For goals or assignments that are highly complex, take special care to ensure that the work doesn't become too overwhelming.

People who work in complicated and demanding roles probably have a high level of motivation already. However, they can often push themselves too hard if measures aren't built into the goal expectations to account for the complexity of the task. It's therefore important to do the following:

- Give the person sufficient time to meet the goal or improve performance.
- Provide enough time for the person to practice or learn what is expected and required for success.

The whole point of goal setting is to facilitate success. Therefore, you want to make sure that the conditions surrounding the goals don't frustrate or inhibit people from accomplishing their objectives. This reinforces the 'Attainable' part of SMART.

### Key Points

Goal setting is something most of us recognize as necessary for our success.

By understanding goal setting theory, you can effectively apply the principles to goals that you or your team members set. Locke and Latham's research emphasizes the usefulness of SMART goal setting, and their theory continues to influence the way we set and measure performance today.

Use clear, challenging goals, and commit yourself to achieving them. Provide feedback on goal performance. Take into consideration the complexity of the task. If you follow these simple rules, your goal setting process will be much more successful, and your overall performance will improve.

## 6.10 Golden Rules of Goal Setting

### Five rules to set yourself up for success

Have you thought about what you want to be doing in five years' time? Are you clear about what your main objective at work is at the moment? Do you know what you want to have achieved by the end of today?

If you want to succeed, you need to set goals. Without goals you lack focus and direction. Goal setting not only allows you to take control of your life's direction; it also provides you a benchmark for determining whether you are actually succeeding. Think about it: Having a million dollars in the bank is only proof of success if one of your goals is to amass riches. If your goal is to practice acts of charity, then keeping the money for yourself is suddenly contrary to how you would define success.

To accomplish your goals, however, you need to know how to set them. You can't simply say, 'I want.' and expect it to happen. Goal setting is a process that starts with careful consideration of what you want to achieve, and ends with a lot of hard work to actually do it. In between there are some very well defined steps that transcend the specifics of each goal. Knowing these steps will allow you to formulate goals that you can accomplish.

Here are our Five Golden Rules of Goal Setting:

## The Five Golden Rules

### Rule #1: Set Goals that Motivate You

When you set goals for yourself, it is important that they motivate you: This means making sure it is something that's important to you and there is value in achieving it. If you have little interest in the outcome, or it is irrelevant given the larger picture, then the chances of you putting in the work to make it happen are slim. Motivation is key to achieving goals.

Set goals that relate to the high priorities in your life. Without this type of focus you can end up with far too many goals, leaving you too little time to devote to each one. Goal achievement requires commitment, so to maximize the likelihood of success, you need to feel a sense of urgency and have an 'I must do this' attitude. When you don't have this 'must do' factor, you risk putting off what you need to do to make the goal a reality. This in turn leaves you feeling disappointed and frustrated with yourself, both of which are de-motivating. And you can end up in a very destructive 'I can't do anything or be successful at anything' frame of mind.

**Tip:**

To make sure your goal is motivating, write down *why* it's valuable and important to you. Ask yourself, 'If I were to share my goal with others, how would I tell them to convince them it was a worthwhile goal?' You can use this motivating value statement to help you if you start to doubt yourself or lose confidence in your ability to actually make it happen.

### Rule #2: Set SMART Goals

You have probably heard of 'SMART goals' already. But do you always apply the rule? The simple fact is that for any goal to be achieved it must be designed to be SMART. There are many variations on what SMART stands for, but the essence is this – Goals should be:

Specific

Measurable

Attainable

Relevant

Time Bound

#### ***Set Specific Goals***

Your goal must be clear and well defined. Vague or generalized goals are not achievable because they don't provide sufficient direction. Remember, you need goals to show you the way. How useful would a map of the United States be if there were only state borders marked on it and you were trying to get from Miami to Los Angeles? Do you even know which state you are starting from let alone which one you're headed to? Make it as easy as you can to get where you want to go by defining precisely where it is you want to end up.

#### ***Set Measurable Goals***

Include precise amounts, dates, etc in your goals so you can measure your degree of success. If your goal is simply defined as 'To reduce expenses' how will you know when you are successful? In one month's time if you have a 1% reduction or in two year's time when you have a 10% reduction? Without a way to measure your success you miss out on the celebration that comes with knowing you actually achieved something.

***Set Attainable Goals***

Make sure that it's possible to achieve the goals you set. If you set a goal that you have no hope of achieving you will only demoralize yourself and erode your confidence.

However, resist the urge to set goals that are too easy. Accomplishing a goal that you didn't have to work very hard for can be an anticlimax at best, and can also make you fear setting future goals that carry a risk of non-achievement. By setting realistic yet challenging goals you hit the balance you need. These are the types of goals that require you to 'raise the bar' and they bring the greatest personal satisfaction.

***Set Relevant Goals***

Goals should be relevant to the direction you want your life and career to take. By keeping goals aligned with this, you'll develop the focus you need to get ahead and do what you want. Set widely scattered and inconsistent goals, and you'll fritter your time – and your life – away.

***Set Time-Bound Goals***

Your goals must have a deadline. This again, is so that you know when to celebrate your success. When you are working on a deadline, your sense of urgency increases and achievement will come that much quicker.

**Rule #3: Set Goals in Writing**

The physical act of writing down a goal makes it real and tangible. You have no excuse for forgetting about it. As you write, use the word 'will' instead of 'would like to' or 'might'. For example, 'I will reduce my operating expenses by 10% this year.' Not, 'I would like to reduce my operating expenses by 10% this year.' The first goal statement has power and you can 'see' yourself reducing expenses, the second lacks passion and gives you an out if you get sidetracked.

**Tip 1:**

Frame your goal statement positively. If you want to improve your retention rates say, 'I will hold on to all existing employees for the next quarter' rather than 'I will reduce employee turnover.' The first one is motivating; the second one still has a get-out clause 'allowing' you to succeed even if some employees leave.

**Tip 2:**

If you use a [To Do List](#), make yourself a To Do List template that has your goals at the top of it. If you use an Action Program (see Mind Tools' [Make Time for Success!](#) course), then your goals should be at the top of your Project Catalog.)

Post your goals in visible places to remind yourself everyday of what it is you intend to do. Put them on your walls, desk, computer monitor, bathroom mirror or refrigerator as a constant reminder. You can even post them in the Mind Tools Career Excellence Club forum and share them with other members, for added motivation.

**Rule #4: Make an Action Plan**

This step is often missed in the process of goal setting. You get so focused on the outcome that you forget to plan all of the steps that are needed along the way. By writing out the individual steps, and then crossing each one off as you complete it, you'll realize that you are making progress towards your ultimate goal. This is especially important if your goal is big and demanding, or long-term. Read our article on Action Plans for more on how to do this.

**Rule #5: Stick With It!**

Remember, goal setting is an ongoing activity not just a means to an end. Build in reminders to keep you on track and remember to review your goals continuously. Your end destination may

remain quite similar over the long term but the action plan you set for yourself along the way can change significantly. Make sure the relevance, value, and necessity remain high.

### Key Points

Goal setting is much more than simply saying you want something to happen. Unless you clearly define exactly what you want and understand why you want it the first place, your odds of success are considerably reduced. By following the Five Golden Rules of Goal Setting you can set goals with confidence and enjoy the satisfaction that comes along with knowing you achieved what you set out to do. What will you decide to accomplish today?

## 6.11 Backward Goal-Setting

### Using backward planning to set goals

If your goal is to become an account executive within the next five years, where do you start your planning process? Or if your team needs to redesign the company's organizational structure, where do you begin?

In planning, most of us would usually start building our plan from start to finish. What do you have to do first, second, third, and so on? What milestones do you have to reach before you can continue on with the next step in the plan? By what date does each step need to be completed?

This is a solid form of [Personal Goal Setting](#) that works very well. When combined with the [Golden Rules of Goal Setting](#), you have a motivating formula that can help you actively move yourself forward.

### A New Approach

However, there's another, simple but lesser-used method of goal setting that can be equally as powerful. It can show you other ways to achieve the same result, and it can help you deal with the necessary unknowns of goal setting that can so often cause you to give up on your plan entirely.

It's called backward planning, backward goal-setting, or backward design, and it's used quite often in education and training. The idea is to start with your ultimate objective, your end goal, and then work backward from there to develop your plan. By starting at the end and looking back, you can mentally prepare yourself for success, map out the specific milestones you need to reach, and identify where in your plan you have to be particularly energetic or creative to achieve the desired results.

It's much like a good presentation, when the presenter tells you where he's headed right at the beginning. Then, as the presentation unfolds, it's easy for you to follow the concepts and think critically about what's being said. If you have to figure out the main points as they come, your energy is often used up by just trying to keep up.

### The Backward Planning Process

Here's how it works:

1. Write down your ultimate goal. What specifically do you want to achieve, and by what date?

*Example: 'By January 1, 2013, I will be the key accounts director for Crunchy Chips International.'*



2. Then ask yourself what milestone you need to accomplish just before that, in order to achieve your ultimate goal. What specifically do you have to do, and by when, so that you're in a position to reach your final objective?

*Example: 'By September 30, 2011, I will successfully complete the executive training program offered by Crunchy Chips International.'*

3. Then work backward some more. What do you need to complete before that second-to-last goal?

*Example: 'By March 1, 2011, I will submit my application for the executive training program, outlining my successes as a key accounts manager, and I will be accepted into the program.'*

4. Work back again. What do you need to do to make sure the previous goal is reached?

*Example: 'By January 1, 2011, I will complete my second year as a key accounts manager with Crunchy Chips International, and I will earn the prestigious Key Accounts Manager of the Year award.'*

5. Continue to work back, in the same way, until you identify the very first milestone that you need to accomplish.

*Example: 'By January 1, 2012, I will complete my first year as a key accounts manager with Crunchy Chips International, and I will be rewarded for my performance by gaining responsibility for clients purchasing over \$10 million per year.'*

*'By January 1, 2011, I will be promoted to key accounts manager with Crunchy Chips International, and I will have responsibility for clients purchasing over \$1 million per quarter.'*

When you read a backward plan, it doesn't look much different from a traditional forward plan. However, creating a backward plan is VERY different. You need to force yourself to think from a completely new perspective, to help you see things that you might miss if you use a traditional chronological process.

This can also help you avoid spending time on unnecessary or unproductive activities along the way. Furthermore, it highlights points of tension within the plan, showing where you'll need to be particularly creative to make the next step successfully.

### **Key Points**

On the surface, backward planning doesn't seem much different from traditional goal-setting processes. You start with a basic vision, and then you ask yourself what needs to be done to achieve that vision. You can read your plan from the beginning to the end, or from the end back to the beginning.

Backward planning, however, is more than reversing the direction of your traditional plan. It's about adopting a different perspective and, perhaps, identifying different milestones as a result. It's a great supplement to traditional planning, and it gives you a much fuller appreciation for what it may take to achieve success. After all, the more alternatives you have, the better your final plan will likely be.

## 6.12 In Flow

### Maximizing productivity through improved focus

What is focus?

Let's take an example. Have you ever seen a hassled mom trying to get her young daughter to leave whatever she is doing and do something else? It's a common enough sight: Young children can get so wrapped up in whatever they're doing that it takes a lot of persuasion to get them to switch their attention.

This ability to focus totally on one thing comes naturally to young children, but it's one of the biggest challenges that most of the rest of us face. We struggle to concentrate and, because of this, fail to get on with the work we're doing.

Some people, though, seem able to focus intensely on what they're doing, and perform exceptionally well as a result. Modern psychologists refer to this state of absolute absorption or concentration in what we are doing, as being 'in flow.'

Mihaly Csikszentmihalyi, who first described the concept, suggests that this state of being able to achieve total focus applies to almost every field of activity. According to Csikszentmihalyi, flow involves '*being completely involved in an activity for its own sake. The ego falls away. Time flies. Every action, movement, and thought follows inevitably from the previous one, like playing jazz. Your whole being is involved, and you're using your skills to the utmost.*' So how do we enter this 'ecstatic' state?

#### Creating the Right Environment

Flow is easiest to achieve when:

- You have enough pressure on you to stay engaged, but not so much that it's harming your performance.
- You believe that your skills are good enough to perform well.
- You have distraction under control.
- You are attending to the task in hand, rather than analyzing and critiquing your performance.
- You are relaxed and alert.
- You are thinking positively, and have eliminated all negative thoughts.

Some of these are hard to achieve in a busy office environment. Your phone rings, your e-mail beeps to indicate that a new message has arrived, and co-workers pop by to ask you questions. At the same time you can't stop thinking about a whole range of personal and work issues that are causing you stress, not least of which is the sheer quantity of work which is piling up.

So if you're to have a good chance of getting into flow, you need to sort out all of these distractions first. Here are some practical things you can do:

- **Get comfortable, and eliminate distraction from your environment.** Rearrange your working environment so that you eliminate as many distractions as possible. Change the orientation of your desk, so that people passing don't distract you. Use plants and screens to damp noise. Adjust furniture so that it's comfortable. If untidiness distracts you, tidy up. Make sure the temperature is comfortable, and that your work area is well lit.
- **Keep interruptions at bay.** Put up the 'Do not disturb' sign, switch off your cell phone, close your email reader and web browser, and do anything, anything that will block the most common things that distract you from work. You'll be surprised at how much you can

get done in just one hour of uninterrupted work, which may be the equivalent of plodding on for several hours if you're handling interruptions at the same time. For more on this, read our article on [managing interruptions](#).

- **Manage your stress.** Identify the sources of stress you experience with a [Stress Diary](#), and then work to reduce or eliminate the greatest stressors. One of the most common sources of stress at work is feeling that you have too much to do. See our section on [time management](#) to find out how to deal with this. And if you're under so much pressure to perform that this is distracting you, use [relaxation imagery](#) to calm yourself down.
- **Keep a To-Do List or Action Program.** Empty your mind of those distracting things you have to do by writing them down in a [to-do list](#) or action program. You'll be amazed how much this can clear your mind! Do the same for worries – write them down and schedule a time to deal with them. And don't try to multi-task: Just concentrate on doing one thing well.
- **Think positively.** It's very hard to concentrate if you have negative thoughts swirling around your mind. What's more, the negativity they cause undermines the way we deal with work, with people and with issues, often making things more difficult. So the final step in preparing to concentrate is to stop thinking negatively and start [thinking positively](#).

Successful athletes commonly use relaxation and positive thinking techniques as they face the challenge of competition. They deal with their feelings of nervousness with relaxation techniques, and by reminding themselves that they have the skills needed to succeed. And when they are out there running, jumping, or throwing, they concentrate on what they're doing, rather than on the distractions around them.

### Getting Into the Flow

With all of that in place, you can start to practice your concentration skills. Try to focus on one task at a time to the exclusion of others, as far as you can.

Before you know it, you will be in flow. You'll be so involved in any activity you undertake that nothing else seems to matter. Not only will your productivity increase, you'll find that your work is more rewarding. Flow is productive, flow is fun, and flow is essential for real success!

### Key Points

When you achieve a state of flow, you're able to achieve more because all of your thoughts and energy are focused on the task in hand. To get into a state of flow, you need to eliminate interruptions and distractions from your environment.

More than this, you need to empty your mind of worries, anxieties, negative thinking, and all those little 'mental notes' that flit in and out of our consciousness. This sounds hard, but in reality is quite easy if you take the time to get into the right habits.

### Apply This to Your Life:

- Look for ways in which you could improve your work environment so that you can get into the flow more efficiently and more often. If you work in an open-plan office, consider using a meeting or rest area when you need to concentrate. Alternatively, use headphones to block out the noise when you're working at your terminal.
- Be disciplined about shutting down your web browser, and only checking your e-mail once you have completed a task.
- Follow our advice, set up an effective time management system, and get on top of the stressful thoughts buzzing around your mind. You'll be amazed by how much better you can concentrate if you get everything down on paper!
- If you get stuck with a certain part of your task, don't succumb to self-distraction and hurry off to get a cup of coffee. Instead, remind yourself that you have the skills to break through the problem, and maintain your focus on finding a solution.

## 6.13 Leverage

### Achieve much more with the same effort

*'Give me a lever long enough and a place to stand, and I can move the Earth.'*

– Archimedes

To lift a heavy object, you have a choice: use leverage or not. You can try to lift the object directly – risking injury – or you can use a lever, such as a jack or a long plank of wood, to transfer some of the weight, and then lift the object that way.

Which approach is wiser? Will you succeed without using leverage? Maybe. But you can lift so much more with leverage, and do it so much more easily!

So what has this got to do with your life and career?

The answer is 'a lot'. By applying the concept of leverage to business and career success, you can, with a little thought, accomplish very much more than you can without it. Without leverage, you may work very hard, but your rewards are limited by the hours you put in. With leverage, you can

#### **Note:**

We're not referring to financial leverage here. Financial leverage, using 'other people's money' to grow your business, can be a successful growth strategy. However, it's outside the scope of this article.

break this connection and, in time, achieve very much more.

### Levers of Success

So how can you apply leverage to your career? And how can you achieve much more, while – if you choose to – reducing the number of hours that you work?

- To do this, you'll need to learn how to use the leverage of:
- Time (yours and that of other people).

- Resources.
- Knowledge and education.
- Technology.

### Time Leverage

Using the leverage of time is the most fundamental strategy for success. There are only so many hours in a day that you can work. If you use only your own time, you can achieve only so much. If you leverage other people's time, you can increase productivity to an extraordinary extent.

To leverage YOUR OWN time.

- Practice effective [time management](#). Eliminate unnecessary activities, and focus your effort on the things that really matter.
- As part of this, learn how to [prioritize](#), so that you focus your energy on the activities that give the greatest return for the time invested.
- Use [goal setting](#) to think about what matters to you in the long term, set clear targets, and motivate yourself to achieve those targets.

To leverage other people's time.

- Learn how to [delegate](#) work to other people.
- Train and empower others.
- Bring in experts and consultants to cover skill or knowledge gaps.
- Outsource non-core tasks to people with the experience to do them more efficiently.

Providing that you do things properly, the time and money that you invest in leveraging other people's time is usually well spent. Remember, though, that you'll almost always have to 'pay' up front in some way in order to reap the longer-term benefits of using leverage.

#### Tip 1:

This is why [delegation](#) is such an important skill: If you can't delegate effectively, you can never expand your productivity beyond the work that you can personally deliver. This means that your career will quickly stall, and while you may be appreciated for your hard work, you'll never be truly successful. Use these skill-builder resources to learn to delegate: [Delegation](#), [Successful Delegation](#) and [The Delegation Dilemma](#).

It's also one of the reasons that micromanagement is such a vice: You spend so much time managing a few people that you constrain the amount of leverage you can exert. See our [Avoiding Micromanagement](#) article for more on this.

#### Tip 2:

As you learn to use the leverage these things give you, you'll find that using them involves some up-front costs, such as the investment of time and resources you'll need to make to get someone started with a job that you'd otherwise need to do.

While it's natural to want to conserve these resources ('I don't have time to train him – it's got to be done by next Tuesday!'), if you don't make these investments, you'll lock yourself into the old way of doing things – and this will limit you to achieving only those things that you can do by yourself.

## Resource Leverage

You can also exert leverage by getting the most from your assets, and taking full advantage of your personal strengths.

You have a wide range of skills, talents, experiences, thoughts, and ideas. These can, and should, be used in the best combination. What relevant skills and strengths do you have that others don't? How can you use these to best effect, and how can you improve them so that they're truly remarkable? What relevant assets do you have that others don't? Can you use these to create leverage? Do you have connections that others don't have? Or financial resources? Or some other asset that you can use to greater effect?

A good way of thinking about this is to conduct a [personal SWOT](#) analysis, focusing on identifying strengths and assets, and expanding from these to identify the opportunities they give you. (An advantage of SWOT is that it also helps you spot critical weaknesses that need to be covered.)

**Tip:**

As you do this, think about how you can help others with your strengths and resources. Remember, when you can give to others, the more you're likely to get in return. (Just make sure that you're clear as to how you will be rewarded!)

## Knowledge and Education Leverage

Another significant lever of success is applied knowledge. Combined with education and action, this can generate tremendous leverage.

Learning by experience is slow and painful. If you can find more formal ways of learning, you'll progress much more quickly. What's more, if you select a good course, you'll have a solid foundation to your knowledge, and one that doesn't have high-risk gaps. This is why people working in life-or-death areas (such as architects, airline pilots, medical doctors and suchlike) need long and thorough training. After all, would you want to be operated on by an unqualified surgeon?

While few of us operate in quite such immediately critical areas, by determining what you need to know, and then acquiring that knowledge, you can avoid many years of slow, painful trial and error learning.

In the same way, it's inefficient if many people in an organization have to learn how to do their work by trial and error. A much better way is for organizations to capture the knowledge gained by the first few in some way and pass it on to others. This is the core of the 'knowledge management' concept. Premium Members of the Career Excellence Club can hear more about this in our Book Insight on [The Complete Idiot's Guide to Knowledge Management](#).

The keys to successfully leveraging knowledge and education are: firstly, knowing what you need to learn; secondly knowing to what level you need to learn it; thirdly, being very focused and selective in your choices; and fourthly, in taking the time to earn the qualifications you need.

Even then, having more education or more knowledge isn't necessarily a point of leverage. These become advantages only when they can be directly applied to your career goals and aspirations--and when they're used actively and intelligently to do something useful.

By hiring, consulting with, and outsourcing to other people, you gain the leverage of their knowledge and education as well as their resources. This only works if you choose the right people – the wrong ones can slow you and drag you down. Don't let this happen!



## Technology Leverage

Finding technology leverage is all about thinking about how you work, and using technology to automate as much of this as you can.

At a simple level, you might find that all you need to keep you in touch with home and work is a laptop computer. Alternatively, a personal digital assistant (PDA) can help you maintain a single, convenient, properly-backed-up time management system. Cell phones that access email and browse the web are handy tools for making the best of your downtime during working hours or while traveling.

If you're a slow typist, voice recognition software can help you dictate documents and save time. Tools like Google Desktop Search (<http://desktop.google.com>) can help you manage and find documents in such a way that you no longer need to file digital documents. And Google itself provides a great, quick way of finding relevant information online.

At a more sophisticated level, you may find that you can use simple desktop databases like Microsoft Access to automate simple work processes. If you do a lot of routine data processing (for example, if you run many similar projects) you can find that this saves you a great deal of time. More than this, you only need to set up a process once with a tool like this – afterwards the process will be executed the same way each time, by whomever initiates the process (this reduces training, meaning that new team members can become productive much more quickly, meaning that you can scale your operations – and your success – more quickly.)

Businesses can choose from a wide array of software solutions. Some of these can automate or simplify tasks that are otherwise very time-consuming. Customer relationship management (CRM) databases can bring tremendous benefits for sales and customer service organizations, as can point-of-sale (PoS) inventory systems for organizations that need to track and manage inventory. Websites and web-based catalogs can give clients easy access to up-to-date product information, and help them place orders simply and easily. And blogs and email-based newsletters help people stay in contact with thousands of people quickly and easily. All of these use technology to provide tremendous leverage.

## Key Points

Using leverage is the art and science of getting much more done with the same, or less, effort. At a simple level, this can free up your time to concentrate on things with the highest priority. At a more sophisticated level, it helps you achieve at a much higher level.

When you invest time and resources to leverage technology – as well as to leverage time, resources, and knowledge (both your own, and that of other people) – you have a recipe for unprecedented success. Use what you and others have to your advantage, and see how far it will take you.

For a detailed discussion of the concept of leverage, see our [Make Time For Success!](#) course on time management and personal productivity. This e-book presents Mind Tools leverage techniques and shows you specific ways to achieve greater success. Planning and scheduling, organizing, and delegating are just a few of the topics covered in detail.

### Apply This to Your Life:

Complete a [personal SWOT](#) analysis. This will help give you a real sense of what you're good at and what activities might benefit from some outside help. From there, you can start to build a leveraging strategy to maximize your productivity and performance.

Look for a mentor who understands and uses leverage, and learn from his or her experiences. This is an example of using leverage to learn more about leveraging – so that exponential factor kicks in again.

Increase your personal expectations. Take a look at your current goals, and ask yourself how much further you could push those goals by using leverage on a consistent basis. You may far surpass your pre-leverage goals once you commit to 'working smart.'

Surround yourself with a network of great people who have skills, knowledge, and expertise that you don't possess. Look for opportunities to create synergy, and leverage the talents of everyone involved. When you work together, you can accomplish so much more than going it alone.

## Section 7: Stress Management

- Stress Diary – Identifying the short-term stress in your life
- Job Analysis – The first step in managing work overload and job stress
- Performance Planning – Planning ahead to reduce performance stress
- Imagery – Mental stress management
- Physical Relaxation Techniques – Deep breathing, PMR and the 'Relaxation Response'
- Thinking On Your Feet – Staying cool and confident under pressure
- Rational Positive Thinking
- Are You a Positive or Negative Thinker? – Learn about - and change - how you think
- Anger Management – Channeling anger productively
- How Good Is Your Anger Management?
- Burnout Self-Test – Testing yourself for burnout
- Building Self-Confidence
- Boosting Your Self-Esteem
- Locus of Control – Finding out who's in charge of your destiny
- Wheel of Life – Finding balance in your life

## 7. Introduction to Stress Management

A lot of research has been conducted into stress over the last hundred years. Some of the theories behind it are now settled and accepted; others are still being researched and debated. During this time, there seems to have been something approaching open warfare between competing theories and definitions: Views have been passionately held and aggressively defended.

What complicates this is that intuitively we all feel that we know what stress is, as it is something we have all experienced. A definition should therefore be obvious... except that it is not.

### Definitions

Hans Selye was one of the founding fathers of stress research. His view in 1956 was that 'stress is not necessarily something bad – it all depends on how you take it. The stress of exhilarating, creative successful work is beneficial, while that of failure, humiliation or infection is detrimental.' Selye believed that the biochemical effects of stress would be experienced irrespective of whether the situation was positive or negative.

Since then, a great deal of further research has been conducted, and ideas have moved on. Stress is now viewed as a 'bad thing', with a range of harmful biochemical and long-term effects. These effects have rarely been observed in positive situations.

The most commonly accepted definition of stress (mainly attributed to Richard S Lazarus) is that **stress is a condition or feeling experienced when a person perceives that demands exceed the personal and social resources the individual is able to mobilize.** In short, it's what we feel when we think we've lost control of events.

This is the main definition used by this section of Mind Tools, although we also recognize that there is an intertwined instinctive stress response to unexpected events. The stress response inside us is therefore part instinct and part to do with the way we think.

### Fight-or-Flight

Some of the early research on stress (conducted by Walter Cannon in 1932) established the existence of the well-known 'fight-or-flight' response. His work showed that when an organism experiences a shock or perceives a threat, it quickly releases hormones that help it to survive.

In humans, as in other animals, these hormones help us to run faster and fight harder. They increase heart rate and blood pressure, delivering more oxygen and blood sugar to power important muscles. They increase sweating in an effort to cool these muscles, and help them stay efficient. They divert blood away from the skin to the core of our bodies, reducing blood loss if we are damaged. As well as this, these hormones focus our attention on the threat, to the exclusion of everything else. All of this significantly improves our ability to survive life-threatening events.

Not only life-threatening events trigger this reaction: We experience it almost any time we come across something unexpected or something that frustrates our goals. When the threat is small, our response is small and we often do not notice it among the many other distractions of a stressful situation.

Unfortunately, this mobilization of the body for survival also has negative consequences. In this state, we are excitable, anxious, jumpy and irritable. This actually reduces our ability to work effectively with other people. With trembling and a pounding heart, we can find it difficult to execute precise, controlled skills. The intensity of our focus on survival interferes with our ability to make fine judgments by drawing information from many sources. We find ourselves more accident-prone and less able to make good decisions.

There are very few situations in modern working life where this response is useful. Most situations benefit from a calm, rational, controlled and socially sensitive approach.

In the short term, we need to keep this fight-or-flight response under control to be effective in our jobs. In the long term we need to keep it under control to avoid problems of poor health and burnout.

## Managing Stress

There are very many proven skills that we can use to manage stress. These help us to remain calm and effective in high pressure situations, and help us avoid the problems of long term stress. In the rest of this section of Mind Tools, we look at some important techniques in each of these three groups.

Keeping a [Stress Diary](#) or carrying out the [Burnout Self-Test](#) will help you to identify your current levels of stress, so you can decide what action, if any, you need to take. [Job Analysis](#) and [Performance Planning](#) will help you to get on top of your workload. While the emotionally-oriented skills of [Imagery](#), [Physical Techniques](#) and [Rational Positive Thinking](#) will help you change the way you see apparently stressful situations. Finally, the article on [Anger Management](#) will help you to channel your feelings into performance.

**Warning:** *Stress can cause severe health problems and, in extreme cases, can cause death. While these stress management techniques have been shown to have a positive effect on reducing stress, they are for guidance only, and readers should take the advice of suitably qualified health professionals if they have any concerns over stress-related illnesses or if stress is causing significant or persistent unhappiness. Health professionals should also be consulted before any major change in diet or levels of exercise.*

## 7.1 Stress Diary

A blue button with rounded corners and a slight gradient, containing the word "Template" in white text.

### Identifying causes of short-term stress

Stress Diaries are important for understanding the causes of short-term stress in your life. They also give you an important insight into how you react to stress, and help you to identify the level of stress at which you prefer to operate.

The idea behind Stress Diaries is that, on a regular basis, you record information about the stresses you are experiencing, so that you can analyze these stresses and then manage them.

This is important because often these stresses flit in and out of our minds without getting the attention and focus that they deserve.

As well as helping you capture and analyze the most common sources of stress in your life, Stress Diaries help you to understand:

- The causes of stress in more detail;
- The levels of stress at which you operate most effectively; and
- How you react to stress, and whether your reactions are appropriate and useful.

Stress Diaries, therefore, give you the important information that you need to manage stress.

### How to Use the Tool

Stress Diaries are useful in that they gather information regularly and routinely, over a period of time. This helps you to separate the common, routine stresses from those that only occur

occasionally. They establish a pattern that you can analyze to extract the information that you need.

Download our free Stress Diary template and make regular entries in your Stress Diary (for example, every hour). If you have any difficulty remembering to do this, set an alarm to remind you to make your next diary entry.

Also make an entry in your diary after each incident that is stressful enough for you to feel that it is significant.

Every time you make an entry, record the following information:

- The date and time of the entry.
- The most recent stressful event you have experienced.
- How happy you feel now, using a subjective assessment on a scale of -10 (the most unhappy you have ever been) to +10 (the happiest you have been). As well as this, write down the mood you are feeling.
- How effectively you are working now (a subjective assessment, on a scale of 0 to 10). A 0 here would show complete ineffectiveness, while a 10 would show the greatest effectiveness you have ever achieved.
- The fundamental cause of the stress (being as honest and objective as possible).

You may also want to note:

- How stressed you feel now, again on a subjective scale of 0 to 10. As before, 0 here would be the most relaxed you have ever been, while 10 would show the greatest stress you have ever experienced.
- The symptom you felt (e.g. 'butterflies in your stomach', anger, headache, raised pulse rate, sweaty palms, etc.).
- How well you handled the event: Did your reaction help solve the problem, or did it inflame it?

You will reap the real benefits of having a stress diary in the first few weeks. After this, the benefit you get will reduce each additional day. If, however, your lifestyle changes, or you begin to suffer from stress again in the future, then it may be worth using the diary approach again. You will probably find that the stresses you face have changed. If this is the case, then keeping a diary again will help you to develop a different approach to deal with them.

Analyze the diary at the end of this period.

### **Analyzing the Diary**

Analyze the diary in the following ways:

- First, look at the different stresses you experienced during the time you kept your diary. List the types of stress that you experienced by frequency, with the most frequent stresses at the top of the list.
- Next, prepare a second list with the most unpleasant stresses at the top of the list and the least unpleasant at the bottom.
- Looking at your lists of stresses, those at the top of each list are the most important for you to learn to control.
- Working through the stresses, look at your assessments of their underlying causes, and your appraisal of how well you handled the stressful event. Do these show you areas where you handled stress poorly, and could improve your stress management skills? If so, list these.



- Next, look through your diary at the situations that cause you stress. List these.
- Finally, look at how you felt when you were under stress. Look at how it affected your happiness and your effectiveness, understand how you behaved, and think about how you felt.

Having analyzed your diary, you should fully understand what the most important and frequent sources of stress are in your life. You should appreciate the levels of stress at which you are happiest. You should also know the sort of situations that cause you stress so that you can prepare for them and manage them well.

As well as this, you should now understand how you react to stress, and the symptoms that you show when you are stressed. When you experience these symptoms in the future, this should be a trigger for you to use appropriate stress management techniques.

### **Key Points**

Stress Diaries help you to get a good understanding of the routine, short-term stresses that you experience in your life. They help you to identify the most important, and most frequent, stresses that you experience, so that you can concentrate your efforts on these. They also help you to identify areas where you need to improve your stress management skills, and help you to understand the levels of stress at which you are happiest, and most effective.

To keep a stress diary, make a regular diary entry with the headings above. For example, you may do this every hour. Also make entries after stressful events.

Analyze the diary to identify the most frequent and most serious stresses that you experience. Use it also to identify areas where you can improve your management of stress.

## **7.2 Job Analysis**

### **The first step in managing job overload**

We have all experienced that appalling sense of having far too much work to do and too little time to do it in. We can choose to ignore this, and work unreasonably long hours to stay on top of our workload. The risks here are that we become exhausted, that we have so much to do that we do a poor quality job, and that we neglect other areas of our life. Each of these can lead to intense stress.

The alternative is to work more intelligently, by focusing on the things that are important for job success and reducing the time we spend on low priority tasks. Job Analysis is the first step in doing this.

To do an excellent job, you need to fully understand what is expected of you. While this may seem obvious, in the hurly-burly of a new, fast-moving, high-pressure role, it is oftentimes something that is easy to overlook.

By understanding the priorities in your job, and what constitutes success within it, you can focus on these activities and minimize work on other tasks as much as possible. This helps you get the greatest return from the work you do, and keep your workload under control.

Job Analysis is a useful technique for getting a firm grip on what really is important in your job so that you are able to perform excellently. It helps you to cut through clutter and distraction to get to the heart of what you need to do.

Note that this tool takes two forms – the short-form we discuss here assumes that your organization is already well organized and that its job descriptions, review criteria and incentives are well-aligned and correct. The long-form (discussed within [the Stress Management Masterclass](#)), helps you to deal with jobs where this is not the case – here, inconsistent job design can cause enormous stress.

## How to Use the Tool

To conduct a job analysis, go through the following steps:

### 1. Review formal job documentation:

- Look at your job description. Identify the key objectives and priorities within it.
- Look at the forms for the periodic performance reviews. These show precisely the behaviors that will be rewarded and, by implication, show those that will be punished.
- Find out what training is available for the role. Ensure that you attend appropriate training so that you know as much as possible about what you need to know.
- Look at incentive schemes to understand the behaviors that these reward.

### 2. Understand the organization's strategy and culture:

Your job exists for a reason – this will ultimately be determined by the strategy of the organizational unit you work for. This strategy is often expressed in a mission statement. In some way, what you do should help the organization achieve its mission (if it does not, you have to ask yourself how secure the job is!). Make sure you understand and perform well the tasks that contribute to the strategy.

Similarly, every organization has its own culture – its own, historically developed values, rights and wrongs, and things that it considers to be important. If you are new to an organization, talk through with established, respected members of staff to understand these values.

Make sure that you understand this culture. Make sure that your actions reinforce the company's culture, or at least do not go against it. Looked at through the lens of culture, will the company value what you do?

Check that your priorities are consistent with this mission statement and the company culture.

### 3. Find out who the top achievers are, and understand why they are successful:

Inside or outside the organization, there may be people in a similar role to you who are seen as highly successful. Find out how they work, and what they do to generate this success. Look at what they do, and learn from them. Understand what skills make them successful, and learn those skills.

### 4. Check that you have the people and resources to do the job:

The next step is to check that you have the staff support, resources and training needed to do an excellent job. If you do not, start work on obtaining them.

### 5. Confirm priorities with your boss:

By this stage, you should have a thorough understanding of what your job entails, and what your key objectives are. You should also have a good idea of the resources that you need, and any additional training you may need to do the best you can.

This is the time to talk the job through with your boss, and confirm that you share an understanding of what constitutes good performance in the role.

It is also worth talking through serious inconsistencies, and agreeing how these can be managed.

### **6. Take Action:**

You should now know what you have to do to be successful in your job. You should have a good idea of the most important things that you have to do, and also the least important.

Where you can drop the less-important tasks, do so. Where you can de-prioritize them, do so.

Where you need more resource or training to do your job, negotiate for this.

Remember to be a little sensitive in the way you do this: Good teamwork often means helping other people out with jobs that do not benefit you. However, do not let people take advantage of you: Be assertive in explaining that you have your own work to do. If you cannot drop tasks, delegate them or negotiate longer time scales.

### **Summary:**

Job analysis is a five-step technique for:

- Understanding and agreeing how to achieve peak performance in your job.
- Ensuring that you and your boss agree on the areas you should concentrate on when time gets tight; and the areas that can be de-emphasized during this time.
- Making sure that you have the resources, training and staff needed to do a good job.

By using the Job Analysis technique, you should gain a good understanding of how you can excel at your job. You should also understand your job priorities.

This helps you to manage the stress of job overload by helping to decide which jobs you should drop.

Job Analysis is just one of many practical action-oriented techniques for reducing the stress of job overload. These and other types of technique help you to resolve structural problems within jobs, work more effectively with your boss and powerful people, improving the way your teams function and become more assertive so that other people respect your right not to take on an excessive workload. These are all important techniques for bringing job stress under control, for improving the quality of your working life, and for achieving career success.

## **7.3 Performance Planning**

### **Planning to manage performance stress**

We all know the feeling of sickness in our stomach before an important presentation or performance. We have all experienced the sweaty palms, the raised heart rate, and the sense of agitation that we feel as these events approach. We have probably all also experienced how much worse this becomes when things go wrong in the run up to an event.

This article helps you deal with this by helping you to prepare well for future performances.

The [Rational Positive Thinking technique](#) that we look at later may be enough to help you manage the fears, anxieties and negative thoughts that may arise in a small performance.

For larger events, it is worth preparing a Performance Plan. This is a pre-prepared plan that helps you to deal effectively with any problems or distractions that may occur, and perform in a positive and focused frame of mind.

## How to Use the Tool

To prepare your Performance Plan, begin by making a list all of the steps that you need to do from getting prepared for a performance through to its conclusion.

Start far enough in advance to sort out any equipment problems. List all of the physical and mental steps that you need to take to:

- Prepare and check your equipment, and repair or replace it where it does not work;
- Make travel arrangements;
- Pack your equipment and luggage;
- Travel to the site of your performance;
- Set up equipment;
- Wait and prepare for your performance; and
- Deliver your performance.

Next, work through each of these steps. Think though:

- Everything that could reasonably go wrong at each step with equipment and arrangements; and
- Any distractions and negative thinking that could undermine your confidence or stop you having a positive, focused frame of mind at the start of and during your performance.

Work through all of the things that could go wrong. Look at the likelihood of the problem occurring. Many of the things you have listed may be extremely unlikely. Where appropriate, strike these out and ignore them from your planning.

Look at each of the remaining contingencies. These will fall into three categories:

1. Things you can eliminate by appropriate preparation, including making back-up arrangements and acquiring appropriate additional or spare equipment;
2. Things you can manage by avoiding unnecessary risk; and
3. Things you can manage with a pre-prepared action or with an appropriate stress management technique

For example, if you are depending on using a data projector for a presentation, you can arrange for a back up projector to be available, purchase a replacement bulb, and/or print off paper copies of the presentation in case all else fails. You can leave earlier than strictly necessary so that you have time for serious travel delays. You can also think through appropriate alternatives if your travel plans are disrupted. If you are forced to wait before your event in an uncomfortable or unsuitably distracting place, prepare the relaxation techniques you can use to keep a calm, positive frame of mind. Research all of the information you will need to take the appropriate actions quickly, and ensure that you have the appropriate resources available.

Also, prepare the positive thinking you will use to counter fears and negative thoughts both before the event and during it. Use stress anticipation skills to ensure that you are properly prepared to manage stress. Then use Rational Positive Thinking skills to prepare the positive thoughts that you will use to protect and build your confidence.

Write your plan down on paper in a form that is easy to read and easy to refer to. Keep it with you as you prepare for, and deliver, your performance. Refer to it whenever you need it in the time leading up to the event, and during it.

## Summary

Performance Plans help you to prepare for an important performance. They bring together practical contingency planning with mental preparation to help you prepare for situations and eventualities that may realistically occur.

This gives you the confidence that comes from knowing you are as well prepared for an event as is practically possible to be. It also helps you to avoid the unpleasant stresses that come from poor preparation, meaning that you can deliver your performance in a relaxed, positive and focused frame of mind, whatever problems or upsets may have occurred.

This article is an abridged version of just one of the techniques used to manage performance stress explained in Mind Tools' [Stress Management Masterclass](#). The 'Managing Performance Stress' module explains how to prepare for the event, how to manage negative thinking leading up to it and how to learn lessons from your experience of stress. As well as this, it shows you how to use a range of useful adrenaline management techniques for controlling the anxiety you will inevitably feel just before your performance.

## 7.4 Imagery

### Mental stress management

Sometimes we are not able to change our environment to manage stress – this may be the case where we do not have the power to change a situation, or where we are about to give an important performance. Imagery is a useful skill for relaxing in these situations.

Imagery is a potent method of stress reduction, especially when combined with [physical relaxation methods](#) such as deep breathing.

You will be aware of how particular environments can be very relaxing, while others can be intensely stressful. The principle behind the use of imagery in stress reduction is that you can use your imagination to recreate and enjoy a situation that is very relaxing. The more intensely you imagine the situation, the more relaxing the experience will be.

This sounds unlikely. In fact, the effectiveness of imagery can be shown very effectively if you have access to biofeedback equipment. By imagining a pleasant and relaxing scene (which reduces stress) you can objectively see the measured stress in your body reduce. By imagining an unpleasant and stressful situation, you can see the stress in your body increase. This very real effect can be quite alarming when you see it happen the first time!

### How to Use the Tool

Two situations where imagery can be very effective are when you're trying to relax and when you're preparing or rehearsing for a [performance](#).

### Imagery in Relaxation

One common use of imagery in relaxation is to imagine a scene, place or event that you remember as safe, peaceful, restful, beautiful and happy. You can bring all your senses into the image with, for example, sounds of running water and birds, the smell of cut grass, the taste of cool white wine, the warmth of the sun, etc. Use the imagined place as a retreat from stress and pressure.

Scenes can involve complex images such as lying on a beach in a deserted cove. You may 'see' cliffs, sea and sand around you, 'hear' the waves crashing against rocks, 'smell' the salt in the air, and 'feel' the warmth of the sun and a gentle breeze on your body. Other images might include

looking at a mountain view, swimming in a tropical pool, or whatever you want. You will be able to come up with the most effective images for yourself.

Other uses of imagery in relaxation involve creating mental pictures of stress flowing out of your body, or of stress, distractions and everyday concerns being folded away and locked into a padlocked chest.

### **Imagery in Preparation and Rehearsal**

You can also use imagery in rehearsal before a big event, allowing you to run through the event in your mind.

Aside from allowing you to rehearse mentally, imagery also allows you to practice in advance for anything unusual that might occur, so that you are prepared and already practiced in handling it. This is a technique used very commonly by top sports people, who learn good performance habits by repeatedly rehearsing performances in their imagination. When the unusual eventualities they have rehearsed using imagery occur, they have good, pre-prepared, habitual responses to them.

Imagery also allows you to pre-experience achievement of your goals, helping to give you the self-confidence you need to do something well. This is another technique used by successful athletes.

### **Key Points**

With imagery, you substitute actual experience with scenes from your imagination. Your body reacts to these imagined scenes almost as if they were real, calming you down and letting adrenaline disperse.

To relax with imagery, imagine a warm, comfortable, safe and pleasant place, and enjoy it in your imagination.

Imagery can be shown to work by using biofeedback devices that measure body stress. By imagining pleasant and unpleasant scenes, you can actually see or hear the changing levels of stress in your body diminish.

## **7.5 Physical Relaxation Techniques**

### **Deep Breathing, PMR and the Relaxation Response**

Physical relaxation techniques are as effective as mental techniques in reducing stress. In fact, the best relaxation is achieved by using physical and mental techniques together.

These three useful physical relaxation techniques can help you reduce muscle tension and manage the effects of the fight-or-flight response on your body. This is particularly important if you need to think clearly and perform precisely when you are under pressure.

The techniques we will look at are Deep Breathing, Progressive Muscular Relaxation and 'The Relaxation Response'.

### **Deep Breathing**

Deep breathing is a simple, but very effective, method of relaxation. It is a core component of everything from the 'take ten deep breaths' approach to calming someone down, right through to yoga relaxation and Zen meditation. It works well in conjunction with other relaxation techniques such as Progressive Muscular Relaxation, relaxation imagery and meditation to reduce stress.

To use the technique, take a number of deep breaths and relax your body further with each breath. That's all there is to it!

### **Progressive Muscular Relaxation**

Progressive Muscular Relaxation is useful for relaxing your body when your muscles are tense.

The idea behind PMR is that you tense up a group of muscles so that they are as tightly contracted as possible. Hold them in a state of extreme tension for a few seconds. Then, relax the muscles normally. Then, consciously relax the muscles even further so that you are as relaxed as possible.

By tensing your muscles first, you will find that you are able to relax your muscles more than would be the case if you tried to relax your muscles directly.

Experiment with PMR by forming a fist, and clenching your hand as tight as you can for a few seconds. Relax your hand to its previous tension, and then consciously relax it again so that it is as loose as possible. You should feel deep relaxation in your hand muscles.

### **The Relaxation Response**

'The Relaxation Response' is the name of a book published by Dr Herbert Benson of Harvard University in 1968. In a series of experiments into various popular meditation techniques, Dr Benson established that these techniques had a very real effect on reducing stress and controlling the fight-or-flight response. Direct effects included deep relaxation, slowed heartbeat and breathing, reduced oxygen consumption and increased skin resistance.

This is something that you can do for yourself by following these steps:

- Sit quietly and comfortably.
- Close your eyes.
- Start by relaxing the muscles of your feet and work up your body relaxing muscles.
- Focus your attention on your breathing.
- Breathe in deeply and then let your breath out. Count your breaths, and say the number of the breath as you let it out (this gives you something to do with your mind, helping you to avoid distraction).

Do this for ten or twenty minutes.

An even more potent alternative approach is to follow these steps, but to use relaxation imagery instead of counting breaths in step 5. Again, you can prove to yourself that this works using the biofeedback equipment.

### **Summary**

'Deep Breathing,' 'Progressive Muscular Relaxation,' and the steps leading to the 'Relaxation Response' are three good techniques that can help you to relax your body and manage the symptoms of the fight-or-flight response.

These are particularly helpful for both handling [nerves](#) prior to an important performance, and reducing stress generally.



## 7.6 Thinking On Your Feet

### Staying cool and confident under pressure

'So, Susan, your report indicates you support forging ahead with the expansion but have you considered the impact this will have on our customers? Surely you remember the fiasco in Dallas last year when they tried the same type of project?'

Yikes! If you're Susan, you're likely feeling under pressure! You have to answer the question and allay the CEO's concerns about the disruption to customers. What do you do? What do you say? How do you say it? What if you can't think of *anything* to say?

This is not an uncommon situation. Whether you are put on the spot while attending a meeting, presenting a proposal, selling an idea, or answering questions after a presentation, articulating your thoughts in unanticipated situations is a skill. Thinking on your feet is highly coveted skill and when you master it, your clever and astute responses will instill immediate confidence in what you are saying.

When you can translate your thoughts and ideas into coherent speech quickly, you ensure your ideas are heard. You also come across as being confident, persuasive, and trustworthy.

Confidence is key when learning to think on your feet. When you present information, give an opinion or provide suggestions, make sure you know what you are talking about and that you are well informed. This doesn't mean you have to know everything about everything, but if you are reasonably confident in your knowledge of the subject, that confidence will help you to remain calm and collected even if you are put unexpectedly in the hot seat.

The secret of thinking on your feet is to be prepared: learn some skills and tactics, and do some preparation for situations that might put you under pressure. Then when you do find yourself faced with unexpected questions and debate, you'll be ready to draw on these tactics and preparation, and so stay poised while you compose your thoughts and prepare your response. Here are some tips and tactics:

#### 1. Relax

This is often the opposite of how you are feeling when you're under pressure, but in order for your voice to remain calm and for your brain to 'think', you have to be as relaxed as possible.

- Take deep breaths
- Take a second and give yourself a positive and affirming message
- Clench invisible muscles (thighs, biceps, feet) for a few seconds and release.

#### 2. Listen

It comes as no surprise that listening is critical to thinking on your feet. Why do you need to listen? To make sure you fully understand the question or request before you reply. If you answer too soon, you risk going into a line of thinking that is unnecessary or inappropriate. To help you with your listening remember to:

- Look directly at the questioner
- Observe body language as well as what is being spoken
- Try to interpret what is being suggested by the question or request. Is this an attack, a legitimate request for more information, or a test? Why is this person asking this and what is the intention?

**Tip:**

Remember that the person is asking a question because he or she is interested. Some interest is positive – they simply want to know more – and some is negative – they want to see you squirm. Either way they are interested in what you have to say. It's your privilege and pleasure not to disappoint them!

### 3. Have the Question Repeated

If you're feeling particularly under pressure, ask for the question to be repeated. This gives you a bit more time to think about your response.

At first glance people think this will only make them look unsure. It doesn't. It makes you look concerned that you give an appropriate response. It also gives the questioner an opportunity to rephrase and ask a question that is more on point. Remember, the questioner may well have just 'thought on his or her feet' to ask the question, so when you give them a second chance, the question may well be better articulated and clearer to all.

By asking to have the question repeated you also get another opportunity to assess the intentions of the questioner. If it is more specific or better worded, chances are the person really wants to learn more. If the repeated question is more aggressive than the first one, then you know the person is more interested in making you uncomfortable than anything else. When that's the case, the next tip comes in very handy.

### 4. Use Stall Tactics

Sometimes you need more time to get your thoughts straight and calm yourself down enough to make a clear reply. The last thing you want to do is blurt out the first thing that comes to your mind. Often this is a defensive comment that only makes you look insecure and anxious rather than confident and composed.

- Repeat the question yourself. This gives you time to think and you clarify exactly what is being asked. It also allows you to rephrase if necessary and put a positive spin on the request.  
*'How have I considered the impact on customers in order to make sure they have a continued positive experience during the expansion?'*
- Narrow the focus. Here, you ask a question of your own to not only clarify, but to bring the question down to a manageable scope.  
*'You're interested in hearing how I've considered customer impacts. What impacts are you most interested in: product availability or in-store service?'*
- Ask for clarification. Again, this will force the questioner to be more specific and hopefully get more to a specific point.  
*'When you say you want to know how I've analyzed customer impacts, do you mean you want a detailed analysis or a list of the tools and methods I used?'*
- Ask for a definition. Jargon and specific terminology may present a problem for you. Ask to have words and ideas clarified to ensure you are talking about the same thing.

### 5. Use Silence to your Advantage

We are conditioned to believe that silence is uncomfortable. However, if you use it sparingly, it communicates that you are in control of your thoughts and confident in your ability to answer

expertly. When you rush to answer you also typically rush your words. Pausing to collect your thoughts tells your brain to slow everything down.

## 6. Stick to One Point and One Supporting Piece of Information

There's a high risk that, under pressure, you'll answer a question with either too much or too little information. If you give too short an answer, you risk letting the conversation slip into interrogation mode. (You'll get another question, and the questioner will be firmly in control of how the dialogue unfolds). When your reply is too long, you risk losing people's interest, coming across as boring, or giving away things that are better left unsaid. Remember, you aren't being asked to give a speech on the subject. The questioner wants to know something. Respect that and give them an answer, with just enough supporting information.

This technique gives you focus. Rather than trying to tie together all the ideas that are running through your head, when you pick one main point and one supporting fact, you allow yourself to

### Tip:

If you don't know the answer, say so. There is no point trying to make something up. You will end up looking foolish and this will lower your confidence when you need to think on your feet in the future. There is (usually) nothing wrong with not knowing something. Simply make sure you follow up as soon as possible afterwards with a researched answer.

answer accurately and assuredly.

## 7. Prepare Some 'What Ifs'

With a bit of forethought, it's often possible to predict the types of questions you might be asked, so you can prepare and rehearse some answers to questions that might come your way. Let's say you are presenting the monthly sales figures to your management team. The chances are your report will cover most of the obvious questions that the management team might have, but what other questions might you predict? What's different about this month? What new questions might be asked? How would you respond? What additional information might you need to have to hand to support more detailed questions?

In particular, spend some time brainstorming the most difficult questions that people might ask, and preparing and rehearsing good answers to them.

## 8. Practice Clear Delivery

How you say something is almost as important as what you say. If you mumble or use 'umm' or 'ah' between every second word, confidence in what you are saying plummets. Whenever you are speaking with people, make a point to practice these key oration skills:

- Speak in a strong voice. (Don't confuse strong with loud!)
- Use pauses strategically to emphasize a point or slow yourself down
- Vary your tone and pay attention to how your message will be perceived given the intonation you use
- Use eye contact appropriately
- Pay attention to your grammar
- Use the level of formality that is appropriate to the situation.

## 9. Summarize and Stop

Wrap up your response with a quick summary statement. After that, resist adding more information. There may well be silence after your summary. Don't make the common mistake of filling the silence with more information! This is the time when other people are adsorbing the information you have given. If you persist with more information, you may end up causing confusion and undoing the great work you've already done in delivering your response.

Use words to indicate you are summarizing (i.e. 'in conclusion,' 'finally') or briefly restate the question and your answer. So – *what did I do to analyze customer impacts? I reviewed the Dallas case files in detail, and prepared a 'What if' analysis for our own situation.*

### Key Points

No one enjoys being putting on the spot or answering questions that you aren't fully expecting. The uncertainty can be stressful. That stress doesn't need to be unmanageable and you can think on your feet if you remember the strategies we just discussed. Essentially, thinking on your feet means staying in control of the situation. Ask questions, buy time for yourself, and remember to stick to one point and make that one point count. When you are able to zoom in on the key areas of concern, you'll answer like an expert and you impress your audience, and yourself, with your confidence and poise.

## 7.7 Rational Positive Thinking

A blue, rounded rectangular button with the word "Worksheet" in white text.

### Positive thinking, built on firm foundations

Have you ever felt really stressed about something, only to see the stress vanish when you talk the situation through with a friend?

Quite often, our experience of stress comes from our perception of a situation. Often that perception is right, but sometimes it isn't. Sometimes we are unreasonably harsh with ourselves, or jump to wrong conclusions about people's motives, and this can send us into a downward spiral of negative thinking.

Rational Positive Thinking are simple tools that help you to change this negative way of thinking. This page teaches you how to use them.

### Introduction

The most commonly accepted definition of stress is that it occurs when a person believes that 'demands exceed the personal and social resources the individual is able to mobilize'. In short, it's when we feel out of control.

When people feel stressed, they have made two main judgments: First, they feel threatened by the situation, and second, they believe that they're not able to meet the threat. How stressed someone feels depends on how much the situation can hurt them, and how closely their resources meet the demands of the situation.

Perception is key to this as (technically!) situations are not stressful in their own right. Rather it is our interpretation of the situation that drives the level of stress that we feel.

Quite obviously, we are sometimes right in what we say to ourselves. Some situations may actually be dangerous, may threaten us physically, socially or in our career. Here, stress and emotion are part of the early warning system that alerts us to a threat.

Very often, however, we are overly harsh and unjust to ourselves in a way that we would never be with friends or co-workers. This, along with other negative thinking, can cause intense stress and unhappiness and can severely undermine our self-confidence.

### Using the Tool:

#### Thought Awareness

You are thinking negatively when you fear the future, put yourself down, criticize yourself for errors, doubt your abilities, or expect failure. Negative thinking damages confidence, harms performance and paralyzes mental skills.

Unfortunately, negative thoughts tend to flit into our consciousness, do their damage and flit back out again, with their significance having barely been noticed. Since we barely realise that they were there, we do not challenge them properly, which means that they can be completely incorrect and wrong.

Thought Awareness is the process by which you observe your thoughts and become aware of what is going through your head.

One approach to it is to observe your 'stream of consciousness' as you think about the thing you're trying to achieve which is stressful. Do not suppress any thoughts. Instead, just let them run their course while you watch them, and write them down on our free worksheet as they occur (you can find the worksheet in your *Worksheets and Templates Supplement* or you can download it [here](#).) Then let them go.

Another more general approach to Thought Awareness comes with logging stress in your [Stress Diary](#). When you analyze your diary at the end of the period, you should be able to see the most common and the most damaging thoughts. Tackle these as a priority using the techniques below.

Here are some typical negative thoughts you might experience when preparing to give a major presentation:

- Fear about the quality of your performance or of problems that may interfere with it.
- Worry about how the audience (especially important people in it like your boss) or the press may react to you.
- Dwelling on the negative consequences of a poor performance.
- Self-criticism over a less-than-perfect rehearsal.

Thought awareness is the first step in the process of managing negative thoughts, as you cannot manage thoughts that you are unaware of.

#### Rational Thinking

The next step in dealing with negative thinking is to challenge the negative thoughts that you identified using the Thought Awareness technique. Look at every thought you wrote down and challenge it rationally. Ask yourself whether the thought is reasonable. What evidence is there for and against the thought? Would your colleagues and mentors agree or disagree with it?

Looking at the examples, the following challenges could be made to the negative thoughts we identified earlier:

- **Feelings of inadequacy:** Have you trained yourself as well as you reasonably should have? Do you have the experience and resources you need to make the presentation? Have you planned, prepared and rehearsed enough? If you have done all of these, you've done as much as you can to give a good performance.

- **Worries about performance during rehearsal:** If some of your practice was less than perfect, then remind yourself that the purpose of the practice is to identify areas for improvement, so that these can be sorted out before the performance.
- **Problems with issues outside your control:** Have you identified the risks of these things happening, and have you taken steps to reduce the likelihood of them happening or their impact if they do? What will you do if they occur? And what do you need others to do for you?
- **Worry about other people's reactions:** If you have prepared well, and you do the best you can, then you should be satisfied. If you perform as well as you reasonably can, then fair people are likely to respond well. If people are not fair, the best thing to do is ignore their comments and rise above them.

**Tip:**

Don't make the mistake of generalizing a single incident. OK, you made a mistake at work, but that doesn't mean you're bad at your job.

Similarly, make sure you take the long view about incidents that you're finding stressful. Just because you're finding these new responsibilities stressful now, doesn't mean that they will ALWAYS be so for you in the future.

Write your rational response to each negative thought in the Rational Thought column on the worksheet.

**Tip:**

If you find it difficult to look at your negative thoughts objectively, imagine that you are your best friend or a respected coach or mentor. Look at the list of negative thoughts and imagine the negative thoughts were written by someone you were giving objective advice to. Then, think how you would challenge these thoughts.

When you challenge negative thoughts rationally, you should be able to see quickly whether the thoughts are wrong or whether they have some substance to them. Where there is some substance, take appropriate action. However, make sure that your negative thoughts are genuinely important to achieving your goals, and don't just reflect a lack of experience, which everyone has to go through at some stage.

### Positive Thinking and Opportunity Seeking

By now, you should already be feeling more positive. The final step is to prepare rational, positive thoughts and affirmations to counter any remaining negativity. It can also be useful to look at the situation and see if there are any useful opportunities that are offered by it.

By basing your affirmations on the clear, rational assessments of facts that you made using Rational Thinking, you can use them to undo the damage that negative thinking may have done to your self-confidence.

**Tip:**

Your affirmations will be strongest if they are specific, are expressed in the present tense and have strong emotional content.

Continuing the examples above, positive affirmations might be:

- **Problems during practice:** 'I have learned from my rehearsals. This has put me in a position where I can deliver a great performance. I am going to perform well and enjoy the event.'
- **Worries about performance:** 'I have prepared well and rehearsed thoroughly. I am well positioned to give an excellent performance.'
- **Problems issues outside your control:** 'I have thought through everything that might reasonably happen and have planned how I can handle all likely contingencies. I am very well placed to react flexibly to events.'
- **Worry about other people's reaction:** 'Fair people will react well to a good performance. I will rise above any unfair criticism in a mature and professional way.'

If appropriate, write these affirmations down on your worksheet so that you can use them when you need them.

As well as allowing you to structure useful affirmations, part of Positive Thinking is to look at opportunities that the situation might offer to you. In the examples above, successfully overcoming the situations causing the original negative thinking will open up opportunities. You will acquire new skills, you will be seen as someone who can handle difficult challenges, and you may open up new career opportunities.

Make sure that identifying these opportunities and focusing on them is part of your positive thinking.

### Summary

This set of tools helps you to manage and counter the stress of negative thinking.

Thought Awareness helps you to understand the negative thinking, unpleasant memories and misinterpretation of situations that may interfere with your performance and damage your self-confidence.

Rational Thinking helps you to challenge these negative thoughts, and either learn from them, or refute them as incorrect.

Positive thinking is then used to create positive affirmations that you can use to counter negative thoughts. These affirmations neutralize negative thoughts and help to [build your self-confidence](#). It is also used to find the opportunities that are often present, to some degree, in a difficult situation.

## 7.8 Are You a Positive or Negative Thinker?

### Learn about – and change – how you think

'A man is but the product of his thoughts. What he thinks, he becomes.'

*Mahatma Gandhi*

'Positive thinking will let you do everything better than negative thinking will.'

*Zig Ziglar – Personal development guru*

These are two powerful quotes. Combined, they tell us that if we think positively, we're likely to enjoy positive results. Negative thinking, on the other hand, can lead to outcomes we don't want.



Positive and negative thoughts can become self-fulfilling prophecies: What we expect can often come true.

If you start off thinking that you'll mess up a task, the chances are that you will: You may not try hard enough to succeed, you won't attract support from other people, and you may not perceive any results as good enough.

Positive thinking, on the other hand, is often associated with positive actions and outcomes. You have hope and faith in yourself and others, and you work and invest hard to prove that your optimism is warranted. You'll enthuse others, and they may well 'pitch in' to help you. This makes constructive outcomes all the more likely.

When it comes down to it, positive, optimistic people are happier and healthier, and enjoy more success than those who think negatively. The key difference between them is how they think about and interpret the events in their life.

So, how do you think about your successes and failures? Do you have a predictable thinking pattern? Find out below.

**Are You a Positive or Negative Thinker?**

Take this short quiz to determine what kind of thinker you are.

**Instructions:** For each statement, circle the number in the column that most applies to how often you tend to think like this.

Statement	Not At All	Rarely	Some-times	Often	Very Often
1. When my boss asks to speak with me, I instinctively assume he/she wants to discuss a problem or give me negative feedback.	5	4	3	2	1
2. When I experience a real difficulty at work/home, other aspects of my life tend to be painted with the same negative brush.	5	4	3	2	1
3. When I experience a setback, I tend to believe that the obstacle will endure for the long-term, e.g. 'The funding didn't come through, so I guess that means they hate the project. All that work for nothing.'	5	4	3	2	1
4. When a team I am on is functioning poorly, I believe the cause is short-term and has a straightforward solution, e.g. 'Boy we're not working well, if we can fix [X], we'll do much better!'	1	2	3	4	5
5. When I'm not chosen for an assignment I really want, I tend to believe that I just don't have the specific skills they are looking for right now, <i>as opposed to thinking I am generally unskilled.</i>	1	2	3	4	5

Statement	Not At All	Rarely	Sometimes	Often	Very Often
6. When something happens that I don't like or appreciate, I can tend to conclude that the cause is widespread in nature and will continue to plague me, e.g. 'My assistant didn't 'cc' me on that email she sent to my boss. Administrative assistants are all out to prove how much smarter they are than their supervisors.'	5	4	3	2	1
7. When I perform very well on an assignment, I believe that it's because I'm generally talented and smart, <i>as opposed to thinking I am good in that one very specific area.</i>	1	2	3	4	5
8. When I receive a reward or recognition, I can tend to figure that luck or fate played more of a role than my actual work or skill, e.g. 'They asked me to be the key note speaker at the conference next year. I guess the other guys were all busy.'	5	4	3	2	1
9. When I come up with a really good idea, I am surprised by my creativity. I figure it is my lucky day, and caution myself not to get used to the feeling.	5	4	3	2	1
10. When something bad happens at work, I see the contributions that everyone made to the mistake, <i>as opposed to thinking that I am incompetent and to blame.</i>	1	2	3	4	5
11. After winning an award/recognition/contract, I believe it's because the competition is not as good as I am, e.g. 'We won that large contract against two strong competitors. We're simply better than they are.'	1	2	3	4	5
12. As the leader, when my team completes a project, I tend to attribute the success to the hard work and dedication of the team members, <i>as opposed to my skilled leadership.</i>	5	4	3	2	1
13. When I make a decision that proves to be successful, it's because I have expertise on that particular subject and analyzed that particular problem really well, <i>as opposed to being generally a strong decision maker.</i>	1	2	3	4	5
14. When I achieve a long term and personally challenging goal, I congratulate myself, and think about all the skills I used to be successful.	5	4	3	2	1
<b>TOTAL</b> (Add up all the numbers you have circled)					

## Score Interpretation

Score	Comment
14-31	Yikes! It must feel as if there is a rain cloud that hangs overhead all day. You have gotten yourself into the habit of seeing things as your fault and you've learned to give up your control in many situations. Taking this quiz is the first step toward turning your pessimism around. Read the rest of this article carefully, and use the exercises daily. Start now!
32-50	You try to be optimistic and positive however some situations get the better of you. Identify your triggers for negative thinking and use rational thinking exercises to become naturally more optimistic. Use the tips later in this article to nail those negative thoughts!
51-70	Great job! You have a generally positive and optimistic outlook on life. You don't take things personally and you are able to see that setbacks won't ruin the rest of your life. Even then, if you are experiencing negative thoughts, do some work to iron them out.

## Turn Negatives into Positives

The first step in changing negative thinking is to become aware of it. For many of us, negative thinking is a bad habit – and we may not even know we're doing it!

Consider this example: The guy on the subway who just made a face is surely directing his behavior at you. When the receptionist doesn't greet you in the morning, you must have done something to anger her. Again! You go straight to the coffee machine, because it's Monday morning and you just know you'll be solving problems until lunchtime. When you finally get to your desk, your assistant is waiting for you. 'Oh no,' you think. 'What has he done now? The first problem of the day, yippee!'

If you're feeling bad after reading this, imagine how it would feel to surround yourself with that much negativity. Then ask yourself if this is the way you tend to think in your own life?

Dr Martin Seligman, who has been described as America's most influential psychologist, has done extensive research on thought patterns. In particular, he looks at the impact of an optimistic versus pessimistic outlook on life and success.

Seligman says we explain events using three basic dimensions of Permanence, Pervasiveness and Personalization, with optimistic people on one end of the scale and pessimistic people on the other. We look at these below.

### Permanence (Statements 3, 4, 9, 11)

Your total out of 20 for these statements: \_\_\_\_\_

Your score shows how far you believe that something you are experiencing is either permanent or temporary. A low score implies that you think bad times will carry on forever. A high score shows confidence that you'll be able to get things back on course quickly.

**Pessimist:** I lost my job and I'll never find one as good again. No point even looking!

**Optimist:** I lost my job. Thank goodness there are other opportunities I can explore!

**Pervasiveness (Statements 2, 5, 6, 7 and 13)**

Your total out of 25 for these statements: \_\_\_\_\_

Your score shows how far you believe that situational factors cause an effect, as opposed to the view that the effect is evidence of more universal factors at work. A low score shows that you tend to think that if you've experienced a problem in one place, you'll experience that problem wherever you go.

**Pessimist:** I lost my job. Companies are all the same; all they care about is money. I don't know why I bother putting in any effort at all.

**Optimist:** I lost my job. It's too bad our company has to reinvent itself to stay competitive. Thankfully I learned some great transferable skills!

**Personalization (Statements 1, 8, 10, 12 and 14)**

Your total out of 25 for these statements: \_\_\_\_\_

Your score shows how far you believe that something about you influenced the outcome, as opposed to the view that something external to you caused it. A low score indicates that you tend to blame yourself for bad things, rather than attributing the cause to more general factors.

**Pessimist:** I lost my job. If I had been a decent employee they would have found a new job for me.

**Optimist:** I lost my job. I gave it my all, however they just can't use my skill set right now.

**Re-shape Your Thinking**

Your answers to the questions in this quiz can show whether you have a positive or negative pattern of thinking. They're also great starting points to become more aware of your thoughts – and the effect they have on your life.

When you're aware of the way you think, you can take action to use positive situations to your advantage, and re-shape the negative ones. The goal is to think positively, regardless of the situation, and make a conscious effort to see opportunities instead of obstacles.


So, in our example, if you immediately think the receptionist is mad at you because she didn't say hello, how rational is that? Could she have been busy or distracted when you walked by? Did you say hello to her? Maybe she wasn't feeling well, or she was in a negative mood herself. These are all more rational reasons for her behavior than simply assuming that you did something wrong.

To help you start thinking positively, see our comprehensive article on [Rational Positive Thinking](#). This is a 'must read' for everyone, even very positive thinkers, because it shows why positive thinking is so important, and it discusses how to turn negative thought patterns into positive ones.

Persistent negative thinking can cause mental health problems, including depression. While these positive thinking techniques have been shown to have a positive effect, they are for guidance only, and readers should take the advice of suitably qualified health professionals if they are experiencing persistent unhappiness.

## 7.9 Anger Management

### Channeling anger into performance

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Anger can be normal and healthy emotion that helps us instinctively detect and respond to a threatening situation. More than this, when it is properly channeled, it can be a powerful motivating force – we all know how hard we can work to remedy an obvious injustice.

However it can also be an emotion that gets out of control, leading to stress, distress, unhealthiness and unhappiness. Uncontrolled anger can seriously harm your personal and professional life, because it can become incredibly destructive – to yourself and the people around you.

And in a modern workplace that often demands trust and collaboration, it can cause great damage to working relationships.

This article teaches an effective 12-step approach that helps you direct your anger constructively rather than destructively. The 12-step approach is based on the ideas of Duke University's Redford Williams, MD, who with his wife, authored the best-selling book *Anger Kills*. (In this book, Williams discusses 17 steps for controlling anger – these are often abridged to the 12 steps described here.)

#### Understanding the Theory

Anger is a well-developed coping mechanism that we turn to when our goals are frustrated, or when we feel threat to ourselves or to people, things and ideas we care about. It helps us react quickly and decisively in situations where there is no time for a careful, reasoned analysis of the situation. And it can motivate us to solve problems, achieve our goals, and remove threats.

Acting in anger can serve, therefore, to protect yourself or others. A positive response and constructive outcome can improve your self-esteem and self-confidence.

#### The Danger of Anger – Foolishness...

On the other hand, a negative response can damage relationships and lead to a loss of respect and self-respect. This is particularly the case when we react instantly and angrily to what we perceive to be a threat, but where that perception is wrong. This can leave us looking very foolish.

So we need to learn to use anger positively, and manage it so that it is constructive and not destructive. Where situations are not immediately life-threatening, we need to calm down and evaluate the accuracy of our perceptions before, if necessary, channeling anger in a powerful but controlled way.

Anger management, then, is the process of learning how to 'calm down' and diffuse the negative emotion of anger before it gets to a destructive level.

#### A Subjective Experience

People experience anger in many different ways and for many different reasons. What makes you angry may only mildly irritate one of your colleagues, and have little to no effect on another. This subjectivity can make anger difficult to understand and deal with; it also highlights that the response is down to you. So anger management focuses on managing your response (rather than specific external factors). By learning to manage your anger, you can develop techniques to deal with and expel the negative response and emotions before it causes you serious stress, anxiety and discomfort.

Despite our differences in the level of anger we feel toward something, there are some universal causes of anger that include:

- Frustration of our goals
- Hurt
- Harassment
- Personal attack (mental or physical) on ourselves
- Threat to people, things or ideas that we hold dear.

We commonly experience these potential anger triggers in our daily lives. An appropriate level of anger that is expressed correctly helps us take the right action, solve the problem that is presenting itself, or deal with the situation in a positive manner. If we can learn to manage our anger, we will learn to express it appropriately and act constructively.

### Using the Tool

So when you're angry, use Redford Williams' 12 steps to calm down:

#### **Step 1: Maintain a 'Hostility Log'**

Take the Hostility Log worksheet that's in your *Worksheets and Templates Supplement* or download an editable pdf version free [here](#) and use it to monitor what triggers your anger and the frequency of your anger responses. When you know what makes you angry, you will be in a much better position to develop strategies to contain it or channel it effectively.

#### **Step 2: If you do, acknowledge that you have a problem managing anger**

It is an observed truth that you cannot change what you don't acknowledge. So it is important to identify and accept that anger is a roadblock to your success.

#### **Step 3: Use your support network**

If anger is a problem, let the important people in your life know about the changes you are trying to make. They can be a source of motivation and their support will help you when you lapse into old behavior patterns.

#### **Step 4: Use Anger Management techniques to interrupt the anger cycle**

- Pause
- Take deep breaths
- Tell your self you can handle the situation
- Stop the negative thoughts

#### **Step 5: Use empathy**

If another person is the source of your anger, try to see the situation from his or her perspective. Remind yourself to be objective and realize that everyone makes mistakes and it is through mistakes that people learn how to improve.

#### **Step 6: Laugh at yourself**

Humor is often the best medicine. Learn to laugh at yourself and not take everything so seriously.

The next time you feel tempted to kick the photocopier, think about how silly you would look and see the humor in your inappropriate expressions of anger.

#### **Step 7: Relax**

Angry people are often the ones who let the little things bother them. If you learn to calm down you will realize that there is no need to get uptight and you will have fewer angry episodes.

**Step 8: Build Trust**

Angry people can be cynical people. They believe that others are going to do something on purpose to annoy or frustrate them even before it happens. If you can build trust in people you will be less likely to become angry with them when something does go wrong and more likely to attribute the problem to something other than a malicious intent.

**Step 9: Listen**

Miscommunication contributes to frustrating and mistrusting situations. The better you listen to what a person is saying, the better able you will be to find a resolution that does not involve an anger response.

**Step 10: Be Assertive**

Remember, the word is assertive NOT aggressive. When you are angry it is often difficult to express yourself properly. You are too caught up in the negative emotion and your physiological symptoms (beating heart, red face) to put together solid arguments or appropriate responses. If you learn to assert yourself and let other people know your expectations, boundaries, issues, and so on, you will have much more interpersonal success.

**Step 11: Live each day as if it is your last**

This saying may be overused, but it holds a fundamental truth. Life is short and it is much better spent positively than negatively. Realize that if you spend all your time getting angry, you will miss out on the many joys and surprises that life has to offer.

**Step 12: Forgive**

To ensure that the changes you are making go much deeper than the surface, you need to forgive the people in your life that have angered you. It is not easy letting go of past hurts and resentments but the only way to move past your anger is to let go of these feelings and start fresh. (Depending on what, or who, is at the root of your anger, you may have to solicit the help of a professional to achieve this fully.)

These 12 steps form a comprehensive plan to get control of inappropriate and unproductive anger. And the quicker you begin the better. Anger and stress are highly correlated and the effects of stress on the body are well documented. Visit the MindTools stress management section to learn even more about the effects of stress and how to deal with it. You will find that many of the techniques presented here are used in stress management as well because both are negative, emotional-based influences in our lives, and the approach for dealing with them is therefore quite similar.

Even if you are not at the point where you feel your anger is a problem, it is a wise idea to familiarize yourself with the processes listed. If you do not have the tools to deal with anger correctly, it has a way of building-up over time. Before you know it, you can be in a position where anger is controlling you and becoming a negative influence in your life. Being proactive with anger management will help to ensure it remains a healthy emotion that protects you from unnecessary hurt or threat.

**Key Points**

Anger is a powerful force, both for good and bad. Used irresponsibly, it can jeopardize your relationships, your work and your health.

Redford Williams' 12-step approach for dealing with unconstructive anger is a well-balanced system that emphasizes knowing yourself and your triggers and then using that awareness to replace negative angry behavior with more positive actions and thoughts. While you don't want to quell your anger completely, you do need to manage it if you're to use it creatively.

And remember that anger can be creative. People act when they get angry. And providing their actions are constructive, this actually helps drive change and get things done.



## 7.10 How Good is Your Anger Management?

### Controlling your anger before it controls you

We all get angry. It's a normal emotion. However, some of us handle our anger better than others.

While one person might be a bit unhappy when someone cuts him off in traffic, another is so angry that he shouts and swears, and starts driving aggressively himself.

How can the same event cause such different reactions? And how can you make sure that your reaction is the calm one, instead of the wild one?

#### How Good is Your Anger Management?

So how well do you manage your anger? Use the online test below to find out how well you do.

**Instructions:** For each statement, circle the number in the column that most applies.

Statement	Not At All	Rarely	Some-times	Often	Very Often
1. I seem to get angry unexpectedly, without really understanding why.	5	4	3	2	1
2. When someone makes me angry, I try not to show my emotions, and pretend to tolerate it.	5	4	3	2	1
3. When I encounter a problem, I identify the 'right' solution myself and get it implemented as fast as possible.	5	4	3	2	1
4. When I'm angry, I hit something (or I want to hit something).	5	4	3	2	1
5. When something frustrating happens, I know it's not the end of the world.	1	2	3	4	5
6. When something really frustrates me, I can usually see the humor in the situation, and I laugh at myself and/or the others involved.	1	2	3	4	5
7. When people make me angry, I try to understand why they did or said what they did.	1	2	3	4	5
8. I feel that I'm able to control my anger.	1	2	3	4	5
9. I can forgive people after they've hurt or angered me.	1	2	3	4	5
10. When I feel angry, I give myself a 'time out' (I walk away to calm down).	1	2	3	4	5
11. I have an activity, hobby, or routine I use to release my feelings of anger.	1	2	3	4	5

Statement	Not At All	Rarely	Sometimes	Often	Very Often
12. When I'm angry, I tend to focus on my feelings and how I've been wronged.	5	4	3	2	1
13. After I've been angry, I think about what I could or should have done to control my anger better.	5	4	3	2	1
14. When I'm angry, I find alternatives and give myself enough time to make a good choice to solve my problems.	1	2	3	4	5
15. When I'm angry, I tend to yell, curse, and say things that I later regret.	5	4	3	2	1
16. When someone asks me to do something I really don't want to do, I agree – and then I'm angry at myself later.	5	4	3	2	1
17. If I know a certain situation will make me angry, I avoid it.	1	2	3	4	5
18. If another person damages something of mine due to carelessness, I confront the person and use the situation to talk about responsibility.	1	2	3	4	5
<b>TOTAL</b> (Add up all the numbers you have circled)					

**Score Interpretation**

Score	Comment
18-41	You seem to let your anger control you, which probably causes you all sorts of problems. In turn, this may make you more angry. Fortunately, you can learn how to break this cycle. Read the rest of the article for some great strategies for managing your anger.
42-66	You're able to manage your anger in some situations and not others. You have a few strategies that work for you, however, you'll benefit from a better understanding of what causes your anger, and what actions you can take to better manage your emotions.
67-90	Well done! You have a very good understanding of what makes you angry, and you know what to do when you start to feel signs of trouble. You've developed a wide range of anger management strategies, and you can be proud of these.

**Manage Your Anger Constructively**

The goal of anger management is not to eliminate anger completely: that isn't possible, since it's a natural human emotion. Rather, the objective is to control and direct your anger – so that it doesn't control you, or damage an important relationship or situation.

In [Anger Management: Channeling Anger into Performance](#), we discuss Redford Williams's steps for controlling anger. There are three key elements to these:

1. Understanding what causes your anger.
2. Reducing your angry reactions.
3. Controlling your anger when you experience it.

### **Understand What Causes Your Anger** (Statements 1, 8 and 13)

Your score out of 15 for these statements: \_\_\_\_\_

One of the most effective approaches for managing anger is to identify the sources of the anger you experience. Once you know what makes you angry, you can develop strategies for dealing with it. When you're in the middle of a bad situation, it's hard to think logically and rationally, so understanding what causes your anger can help you plan how to deal with it.

- Use a diary or 'anger log' to write down the times, people, and situations that make you angry.
- Look for trends, or things that make you angry often.
- Ask yourself why these things make you angry. Do you connect certain memories to these sources of anger? Do you feel that goals are being frustrated, or that something important to you is being threatened?

### **Reduce Your Angry Reactions**

While you probably won't eliminate anger completely, you can certainly reduce the frequency and scope of your anger. The less angry you are in general, the more control you'll have over your emotions. Since much of our anger can come from frustration and stress, if you work on ways to ease and reduce these causes of frustration and stress, you'll reduce the amount of anger in your life.

#### **Use Problem Solving Skills** (Statements 3, 5, and 14)

Your score out of 15 for these statements: \_\_\_\_\_

A great way to reduce stress is to improve your problem solving skills. We sometimes feel that everything we do needs to be correct and turn out well, and this can be frustrating when things don't turn out as they should. Instead of expecting yourself always to be right, commit to doing your best. That way you can be proud of your effort even if the end result isn't what you want.

Also, accept that when something doesn't work out, the world usually won't end. Sometimes you just need to relax and not let things bother you. We may think that we should have an answer for everything – but the truth is, we don't!

#### **Use Communication Skills** (Statements 7, 12, 15, and 18)

Your score out of 20 for these statements: \_\_\_\_\_

You can also reduce anger by improving your communication skills. When you relate well to other people, express your needs, and talk about issues that bother you, you deal with potential anger proactively.

- Build empathy – When you understand another person's perspective, it helps you analyze the situation objectively and understand your role in the conflict. Accept that you may not always know best!

- Learn to trust others – Assume the best in people, and don't take their actions personally.
- Listen – Use active listening to consider what the other person has to say, and then think before you speak. In many situations, the best way to deal with anger is to accept it, and then find ways to move forward. This can protect your relationships with people, and it allows you to acknowledge your feelings.
- Be assertive, not aggressive – By improving your [assertiveness skills](#), you can reduce the frustration that you feel when your needs aren't being met. When you know how to ask for what you want, you'll generally feel more in control, and less likely to say things that you'll later regret.

**Tip:**

Don't try to communicate when you're still upset. See the next section on controlling your anger for ideas on how to do this.

**Release Your Anger** (Statements 2, 8, 11, and 16)

Your score out of 20 for these statements: \_\_\_\_\_

You can reduce the likelihood of losing control by releasing the anger that you've built up. When you get rid of angry feelings on a regular basis, you'll feel calmer and more even-tempered, and you'll be more able to deal with the ups and downs of daily life. You can do a variety of things to release your anger, including the following:

- Take 10 deep breaths. It really does work!
- Do some physical activity – walk, run, swim, play golf, or do some other sport. This can be great for releasing the stress and frustration you've built up!
- Use a punching bag or a pillow to physically express your anger (in a way that's not harmful).
- Do yoga, or another relaxing form of exercise.
- Participate in a fun activity or hobby.
- Use a journal and/or art to express your feelings.
- Forgive. At some point, it helps to let go and move on with a fresh attitude.

Some people believe that they have to hold their anger in to control it. This is not an effective anger management strategy. Even if you don't show anger to others, that emotion has to go somewhere: it can be stubborn, and it usually doesn't go away on its own.

**Control Your Anger When You Experience It** (Statements 4, 6, 10, and 17)

Your score out of 20 for these statements: \_\_\_\_\_

When you start to feel angry, what do you do? Controlling yourself in a bad situation can be difficult, and your actions will have consequences.

External reactions – like kicking and screaming – don't help. You may feel good for a little while, but later, you'll surely feel foolish and sorry. Also, you may do permanent damage to relationships and your reputation.

When you feel that you can't hold your anger in any longer, here are some great strategies to try:

### **Change Your Environment**

- Take a break and physically remove yourself from the conflict. Go to another room, go for a walk, or count to 10. This may give you time to gain perspective and simply calm down.
- Learn to avoid situations that you know will cause your anger. If you don't like your teammate's messy desk, don't go into her office.
- If you regularly do something that makes you angry, try to find something else to do in its place. For example, if the crowded elevator upsets you every morning, take the stairs.

### **Use Humor**

- Think of something funny to say (but don't be rude or sarcastic).
- Try to see the funny side of the situation.
- Imagine the other person in a silly situation.
- Learn to laugh at yourself.
- Smile. It's hard to be angry with a smile on your face.

### **Calm Yourself Physically**

- Use physical relaxation techniques. Take slow, deep breaths and concentrate on your breathing.
- Tighten and release small muscle groups. Focus on your hands, legs, back, and toes.
- Repeat a word or phrase that reminds you to stay in control and remain confident. For example, say, 'You'll get through this. Relax! You're doing a great job!'
- Practice imagery techniques. Use your imagination or memory to visualize a calming place or situation.

If your anger is truly out of control, you may want to seek professional support. The effects of uncontrolled anger can be very harmful – to yourself and to those around you. Don't let it get to that point.

### **Key Points**

It is natural to feel, express, and release anger. However, there are appropriate ways to do so – and that's what anger management is all about.

You can get a strong insight into your anger issues by understanding what makes you angry. From there, you can create a plan to minimize frustration and anger in your life.

When you do get angry, there are many approaches you can try to calm down – including changing your environment, using humor, and practicing relaxation techniques. It's also important to release your anger on a regular basis.

Don't let your anger control you. Instead, face it – and take back control of anger – and of your life!

## 7.11 Burnout Self-Test

### Checking yourself for burnout

Burnout occurs when passionate, committed people become deeply disillusioned with a job or career from which they have previously derived much of their identity and meaning. It comes as the things that inspire passion and enthusiasm are stripped away, and tedious or unpleasant things crowd in.

#### Introduction:

This tool can help you check yourself for burnout. It helps you look at the way you feel about your job and your experiences at work, so that you can get a feel for whether you are at risk of burnout.

#### Checking Yourself for Burnout

**Instructions:** For each question, circle the number in the column that most applies.

Question	Not At All	Rarely	Sometimes	Often	Very Often
1. Do you feel run down and drained of physical or emotional energy?	1	2	3	4	5
2. Do you find that you are prone to negative thinking about your job?	1	2	3	4	5
3. Do you find that you are harder and less sympathetic with people than perhaps they deserve?	1	2	3	4	5
4. Do you find yourself getting easily irritated by small problems, or by your co-workers and team?	1	2	3	4	5
5. Do you feel misunderstood or unappreciated by your co-workers?	1	2	3	4	5
6. Do you feel that you have no one to talk to?	1	2	3	4	5
7. Do you feel that you are achieving less than you should?	1	2	3	4	5
8. Do you feel under an unpleasant level of pressure to succeed?	1	2	3	4	5
9. Do you feel that you are not getting what you want out of your job?	1	2	3	4	5
10. Do you feel that you are in the wrong organization or the wrong profession?	1	2	3	4	5
11. Are you becoming frustrated with parts of your job?	1	2	3	4	5

Question	Not At All	Rarely	Some-times	Often	Very Often
12. Do you feel that organizational politics or bureaucracy frustrate your ability to do a good job?	1	2	3	4	5
13. Do you feel that there is more work to do than you practically have the ability to do?	1	2	3	4	5
14. Do you feel that you do not have time to do many of the things that are important to doing a good quality job?	1	2	3	4	5
15. Do you find that you do not have time to plan as much as you would like to?	1	2	3	4	5
<b>TOTAL</b> (Add up all the numbers you have circled)					

### Score Interpretation

Score	Comment
15 – 18	No sign of burnout here.
19 – 32	Little sign of burnout here, unless some factors are particularly severe.
33 – 49	Be careful – you may be at risk of burnout, particularly if several scores are high.
50 – 59	You are at severe risk of burnout – do something about this urgently.
60 – 75	You are at very severe risk of burnout – do something about this urgently.

See our article on [Avoiding Burnout](#) if you think you might be at risk of it. See our article on [Recovering From Burnout](#) if you think it might already have occurred.

**Note:**

*This tool uses an informal approach to assessing burnout, and it has not been validated through controlled scientific tests. Please, therefore, interpret the results with common sense. Also, make allowances for any recent events that may have a disproportionate influence on your mood at the time you take the test!*

*If you prefer scientifically validated tests, then the Maslach Burnout Inventory may be useful. Copies can be purchased at the following site: <https://www.cpp.com/en/detailprod.aspx?pc=35>.*

## 7.12 Building Self-Confidence

### Develop the self-confidence you deserve!

From the quietly confident doctor whose advice we rely on, to the star-quality confidence of an inspiring speaker, self-confident people have qualities that everyone admires.



Self-confidence is extremely important in almost every aspect of our lives, yet so many people struggle to find it. Sadly, this can be a vicious circle: People who lack self-confidence can find it difficult to become successful.

After all, most people are reluctant to back a project that's being pitched by someone who was nervous, fumbling and overly apologetic.

On the other hand, you might be persuaded by someone who spoke clearly, who held his or her head high, who answered questions assuredly, and who readily admitted when he/she did not know something.

Self-confident people inspire confidence in others: Their audience, their peers, their bosses, their customers, and their friends. Gaining the confidence of others is one of the key ways in which a self-confident person finds success.

The good news is that self-confidence really can be learned and built on. And, whether you're working on your own self-confidence or building the confidence of people around you, it's well-worth the effort! All other things being equal, self-confidence is often the single ingredient that distinguishes a successful person from someone less successful.

### So how confident do you seem to others?

Your level of self-confidence can show in many ways: Your behavior, your body language, how you speak, what you say, and so on. Look at the following comparisons of common confident behavior with behavior associated with low self-confidence. Which thoughts or actions do you recognize in yourself and people around you?

Self-Confident	Low Self-Confidence
Doing what you believe to be right, even if others mock or criticize you for it.	Governing your behavior based on what other people think.
Being willing to take risks and go the extra mile to achieve better things.	Staying in your comfort zone, fearing failure and so avoid taking risks.
Admitting your mistakes and vowing to learn from them.	Working hard to cover up mistakes and praying that you can fix the problem before anyone is the wiser.
Waiting for others to congratulate you on your accomplishments.	Extolling your own virtues as often as possible to as many people as possible.
Accepting compliments graciously. 'Thanks, I really worked hard on that prospectus. I'm pleased you recognize my efforts.'	Dismissing compliments offhandedly. 'Oh that prospectus was nothing really, anyone could have done it.'

As you can see from these examples, low self-confidence can be self-destructive, and it often manifests itself as negativity. Self-confident people are generally more positive – they believe in themselves and their abilities, and they also believe in the wonders of living life to the full.

**Tip: Balanced Self-Confidence**

Self-confidence is about balance. At one extreme, we have people with low self-confidence. At the other end, we have people who may be over-confident.

If you are under-confident, you'll avoid taking risks and stretching yourself; and you might not try at all. And if you're over-confident, you may take on too much risk, stretch yourself beyond your capabilities, and crash badly. You may also find that you're so optimistic that you don't try hard enough to truly succeed.

Getting this right is a matter of having the right amount of confidence, founded in reality and on your true ability. With the right amount of self-confidence, you will take informed risks, stretch yourself (but not beyond your abilities) and try hard.

**Building Self-Confidence**

So how do you build this sense of balanced self-confidence, founded on a firm appreciation of reality?

The bad news is that there's no quick fix, or 5-minute solution.

The good news is that building self-confidence is readily achievable, just as long as you have the focus and determination to carry things through. And what's even better is that the things you'll do will build success – after all, your confidence will come from real, solid achievement. No-one can take this away from you!

So here are our three steps to self-confidence, for which we'll use the metaphor of a journey: Preparing for your journey; setting out; and accelerating towards success.

**Step 1: Preparing for Your Journey**

The first step involves getting yourself ready for your journey to self-confidence. You need to take stock of where you are, think about where you want to go, get yourself in the right mindset for your journey, and commit yourself to starting it and staying with it.

In preparing for your journey, do the following things:

**Look at what you've already achieved**

Think about your life so far, and list the ten best things you've achieved in an 'Achievement Log.' Perhaps you came top in an important test or exam, played a key role in an important team, produced the best sales figures in a period, did something that made a key difference in someone else's life, or delivered a project that meant a lot for your business.

Put these into a smartly formatted document, which you can look at often. And then spend a few minutes each week enjoying the success you've already had!

**Think about your strengths**

Next, use a technique like [SWOT Analysis](#) to take a look at who and where you are. Looking at your Achievement Log, and reflecting on your recent life, think about what your friends would consider to be your strengths and weaknesses. From these, think about the opportunities and threats you face.

Make sure that you enjoy a few minutes reflecting on your strengths!

**Think about what's important to you, and where you want to go**

Next, think about the things that are really important to you, and what you want to achieve with your life.

Setting and achieving goals is a key part of this, and real self-confidence comes from this. Goal setting is the process you use to set yourself targets, and measure your successful hitting of those targets. See our article on [goal setting](#) to find out how to use this important technique, or use our [Life Plan Workbook](#) to think through your goals in detail.

Inform your goal setting with your SWOT Analysis. Set goals that exploit your strengths, minimize your weaknesses, realize your opportunities, and control the threats you face.

And having set the major goals in your life, identify the first step in each. A tip: Make sure it's a very small step, perhaps taking no more than an hour to complete!

### **Start managing your mind**

At this stage, you need to start managing your mind. Learn to pick up and defeat the negative self-talk which can destroy your confidence. See our article on [rational positive thinking](#) to find out how to do this.

And learn how to use [imagery](#) to create strong mental images of what you'll feel and experience as you achieve your major goals – there's something about doing this that makes even major goals seem achievable!

### **And then commit yourself to success!**

The final part of preparing for the journey is to make a clear and unequivocal promise to yourself that you are absolutely committed to your journey, and that you will do all in your power to achieve it.

If as you're doing it, you find doubts starting to surface, write them down and challenge them calmly and rationally. If they dissolve under scrutiny, that's great. However if they are based on genuine [risks](#), make sure you set additional goals to manage these appropriately.

Either way, make that promise!

## **Step 2: Setting Out**

This is where you start, ever so slowly, moving towards your goal. By doing the right things, and starting with small, easy wins, you'll put yourself on the path to success – and build the self-confidence that comes with this.

### **Build the knowledge you need to succeed**

Looking at your goals, identify the skills you'll need to achieve them. And then look at how you can acquire these skills confidently and well. Don't just accept a sketchy, just-good-enough solution – look for a solution, a program or a course that fully equips you to achieve what you want to achieve, and ideally gives you a certificate you can be proud of.

### **Focus on the basics**

When you're starting, don't try to do anything clever or elaborate. And don't reach for perfection – just enjoy doing simple things successfully and well.

### **Set small goals, and achieve them**

Starting with the very small goals you identified in step 1, get in the habit of setting them, achieving them, and celebrating that achievement. Don't make goals particularly challenging at this stage, just get into the habit of achieving them and celebrating them. And little by little, start piling up the successes!

### **Keep managing your mind**

Stay on top of that positive thinking, keep celebrating and enjoying success, and keep those mental images strong. You can also use a technique like [Treasure Mapping](#) to make the visualization even stronger!

And on the other side, learn to handle failure. Accept that mistakes happen when you're trying something new. In fact, if you get into the habit of treating mistakes as learning experiences, you can (almost) start to see them in a positive light. After all, there's a lot to be said for the saying 'if it doesn't kill you, it makes you stronger!'

### Step 3: Accelerating Towards Success

By this stage, you'll feel your self-confidence building. You'll have completed some of the courses you started in step 2, and you'll have plenty of success to celebrate!

Now's the time to start stretching yourself. Make the goals a bit bigger, and the challenges a bit tougher. Increase the size of your commitment. And extend the skills you've proven into new, but closely related arenas.

**Tip 1:**

Keep yourself grounded – this is where people tend to get over-confident and over-stretch themselves. And make sure you don't start enjoying cleverness for its own sake...

**Tip 2:**

Consider taking our [How Self Confident Are You?](#) quiz to find out how self-confident you are already, and identify specific strategies for building self-confidence.

As long as you keep on stretching yourself enough, but not too much, you'll find your self-confidence building apace. What's more, you'll have earned your self-confidence – because you'll have put in the hard graft necessary to be... successful.

## 7.13 Boosting Your Self-Esteem

### Improving the way you feel about yourself

*"Self-esteem is the reputation we acquire with ourselves."*

- Nathaniel Branden, Leading self-esteem researcher and theorist

Improving self-esteem is a very personal journey. It's a key part of feeling happy within ourselves, and of feeling that we're succeeding in the things that matter to us.

Positive self-esteem helps you to be yourself, handle adversity, and believe that you'll win through, despite setbacks. It's an inner force that sustains you, and gives you the courage you need to be the person you want to be.

Low self-esteem, on the other hand, does the opposite. It's connected to self-doubt, and to a general feeling that you're not quite good enough to meet life's challenges. If you have low self-esteem, you may believe that you aren't capable of achieving your dreams, and you may even believe that you shouldn't dream at all. In fact, low self-esteem is used to diagnose many mental disorders, and it can be associated with to a variety of negative emotions, including anxiety, sadness, hostility, shame, embarrassment, loneliness and lack of spontaneity.

To evaluate your own levels of self-esteem, complete the [Rosenberg Self-Esteem Scale](#) (SES). This is a 10-item scale developed by Dr. Morris Rosenberg. Even though it was developed in 1965, it's still a popular form of measurement used in self-esteem research.

## What Is Self-Esteem?

You're probably familiar with the idea of self-esteem. It's most often associated with [self-confidence](#), but self-esteem is more than just confidence – it goes deeper. In fact, some people argue that you can have self-confidence and still have low self-esteem – most notably if you approach life with a "fake it 'til you make it" attitude (in other words, "pretend" until you succeed).

Healthy self-esteem doesn't involve faking anything. And although there's significant debate over the definition of self-esteem, a leading theory is that it's a combination of two factors: competence and worthiness.

Other models have focused on one of these factors or the other. However, it's the relationship between the two that provides the best description. Nathaniel Branden says the following in his book "The Psychology of Self-Esteem":

Self-esteem has two interrelated aspects: it entails a sense of personal efficacy and a sense of personal worth. It is the integrated sum of self-confidence and self-respect. It is the conviction that one is competent to live and worthy of living.

### Competence and Worthiness

The competence element of self-esteem deals with how far you believe that you have the skills and abilities you need to succeed in areas that matter to you.

This isn't generalized success, or even a general sense of competence. It's specific to areas of your life that are particularly important to you. For example, if you can sing and dance and entertain a crowd like no one else, that won't contribute to positive self-esteem if what you really value is academic success. Likewise, if you rise to the top of your profession, but you're not proud of that profession, it's unlikely that it will help your sense of self-esteem much.

It's this idea of "value" that brings us to the other element of self-esteem: worthiness. This is where you express your overall evaluation of yourself. It's based on your values, and on whether you routinely behave in a way that is consistent with these values. Together, these factors influence whether you believe you're "good enough", and whether you like and respect the person you are.

By combining competence and worthiness, and by looking at how they relate to each other, we get a full and dynamic definition of self-esteem. Just feeling good about yourself isn't self-esteem. There has to be a competence element, so that your behaviors result in positive actions, not destructive ones. Too great a sense of worthiness can lead to conceit, and even narcissism. Healthy self-esteem keeps those things in balance.

**Note:**

Looking at self-esteem this way allows us to see the difference between healthy self-esteem and too much self-esteem, which can lead to aggressive and destructive behavior. Thinking that you're better than others can cause arrogance, bullying, and worse. And if your level of self-esteem is too far in advance of your abilities, you're setting yourself up for failure, humiliation, frustration and anger. (In fact, some researchers link this to domestic violence.)

## Improving Self-Esteem

Now that you know what self-esteem is, you're in a better position to improve yours in a robust and balanced way.

Here are some tips for improving your self-esteem:

- **Think about yourself positively** – The only person who can change your view of yourself is you! No one else can give you self-esteem – you have to build it by thinking about and using all of the positive things in your life. Make sure that you get into the habit of [positive thinking](#), and learn how to detect and defeat patterns of [self-sabotage](#). And be your own best cheerleader and supporter!
- **Take pride in your accomplishments** – When you do something well, celebrate it. Don't wait for someone else to tell you how wonderful you are. Tell yourself!
- **Set goals** – The more successes you achieve, the better you'll feel about yourself. [Goal setting](#) is a great technique for targeting, tracking and recognizing success. It helps you to build competence and, from this, build a sense of pride and a feeling of worthiness. Make sure that you embrace goal setting!
- **Be consistent** – You improve self-esteem when you act in ways that are consistent with your values. If you find yourself in a compromising or difficult situation, do all that you can to make a decision that is consistent with these values. Achieve your goals with integrity, and don't undermine your self-esteem by cheating, or acting in a dishonest way.
- **Remember that you aren't perfect** – Don't be too hard on yourself. We all make mistakes, and that's often OK, just as long as we learn from them. The only person's standards you have to meet are your own: stop worrying about what others think, and focus on the great things about yourself. If you do, your inner confidence will shine through, and more than compensate for any shortcomings you might have.
- **Look after your physical self** – Being active can improve self-esteem. Activities that improve your overall health help you feel more in control, and give you a sense of satisfaction that carries through to other areas of your life.

### Key Points

The way you feel about yourself is key to self-esteem. You're the one in control, and you can make a difference. If you like yourself, and believe that you deserve good things in life, you'll have high self-esteem. If you dislike yourself or criticize yourself excessively, you'll have low sense of self-esteem.

Having healthy self-esteem is important because it helps you get through life's challenges and achieve the things that matter most to you. As such, make a commitment to yourself to value what you do and who you are!

## 7.14 Locus of Control

### Finding out who's in charge of your destiny

As the environment around you changes, you can either attribute success and failure to things you have control over, or to forces outside your influence. Which orientation you choose has a bearing on your long-term success.

This orientation is known as your 'locus of control'. Its study dates back to the 1960s, with Julian Rotter's investigation into how people's behaviors and attitudes affected the outcomes of their lives.

Locus of control describes the degree to which individuals perceive that outcomes result from their own behaviors, or from forces that are external to themselves. This produces a continuum with external control at one end and internal control at the other:

Figure 1: Locus of Control



People who develop an internal locus of control believe that they are responsible for their own success. Those with an external locus of control believe that external forces, like luck, determine their outcomes.

Use the interactive quiz below to determine your current locus of control:

### Understanding Your Own Locus of Control

**Instructions:** For each pair of statements, choose the one that you believe to be the most accurate, (not the one you wish was most true) and circle the number next to that statement. Remember, there are no right or wrong answers.

	Statement	Select the statement you feel is more accurate
1a	Bad luck is what leads to many of the disappointments in life.	2
1b	Disappointments are usually the result of mistakes you make.	1
2a	Political unrest and war normally occur in countries where people don't get involved, or assert their political rights.	1
2b	No matter how much people get involved, war and political unrest will occur.	2
3a	You 'reap what you sow'. In the end, your rewards will be directly related to what you accomplish.	1
3b	Despite your effort and hard work, what you accomplish will probably go unnoticed.	2



	<b>Statement</b>	<b>Select the statement you feel is more accurate</b>
4a	Teachers treat students fairly and evaluate their performance as objectively as possible.	1
4b	The grades you earn in school have more to do with factors like how much the teacher likes you, or your mood on the day of a test.	2
5a	To become a leader, you must be in the right place at the right time.	2
5b	Those who are capable of leadership but don't lead, have failed to capitalize on the opportunities afforded to them.	1
6a	There are some people in this world that will not like you, no matter what you do.	2
6b	If you have good interpersonal skills and know how to get along with others, then getting people to like you is not difficult at all.	1
7a	If something is meant to happen, it will; there is little you can do to change it.	2
7b	You decide what will happen to you. You don't believe in fate.	1
8a	If you are prepared for an interview, you increase your likelihood of doing well.	1
8b	There is no point preparing for an interview because the questions they ask are completely random and determined by whim.	2
9a	To be successful in your career takes a lot of hard work and dedication, because effort is what makes the difference.	1
9b	It's who you know, not what you know, that determines how good a job you get.	2
10a	One person can have an impact on government policy and decisions.	1
10b	Normal people can't do much to change the world; the elite and powerful make all the decisions.	2
11a	If you set a reasonable goal, you can achieve it with hard work and commitment.	1
11b	You don't plan ahead or set goals because too much can happen that you can't control.	2

	<b>Statement</b>	<b>Select the statement you feel is more accurate</b>
12a	Luck doesn't play a large role in getting what you want out of life.	1
12b	Life is like a game of chance. What you get or what happens to you is mostly a matter of fate.	2
13a	Managers and supervisors got those positions by being in the right place and knowing the right people.	2
13b	To be a manager or supervisor you have to demonstrate that you know how to get things done through, and with, people.	1
14a	Accidents or twists of fate are what really determine the course of a person's life.	2
14b	The notion that luck largely determines your life is a fallacy.	1
15a	People have so many ulterior motives; it's impossible to determine who actually likes you and who doesn't.	2
15b	How you treat people is what determines whether they like you.	1
16a	After all is said and done; the positives and negatives of life are basically half and half.	2
16b	When something negative happens it is usually a result of apathy, lack of knowledge, inability, or a combination of these.	1
17a	Corruption in politics can be eliminated if we all put in enough effort.	1
17b	Once a politician is elected, there is little anyone can do to control him or her.	2
18a	'The assessments I get at work are completely at the whim of my supervisor; I don't understand them at all half the time.'	2
18b	'How hard I work and how much pride I take in my job largely determines the results of my performance assessment.'	1
19a	You often feel that you have little control over your life, and what happens to you.	2
19b	You don't believe that luck or chance play a large role in determining what happens in your life.	1

	Statement	Select the statement you feel is more accurate
20a	If you're lonely, it's because you don't try to hard enough to get along with people and be friendly.	1
20b	Despite being friendly and pleasant, if someone doesn't like you, there's not much you can do to change his or her opinion.	2
21a	The things that happen in your life are of your own doing.	1
21b	You don't have much control over what happens in life, or in the direction your life is headed.	2
22a	Why politicians make the decisions they do is anybody's guess!	2
22b	The people are as much responsible for government decisions as the politicians themselves.	1
<b>TOTAL</b>		

**Score Interpretation**

Score	Comment
22 - 25	Internal Locus of Control (strong)
26 – 33	Internal Locus of Control (moderate)
34 - 44	External Locus of Control

**Note:**  
 This assessment has not been validated and is intended for illustrative purposes only. It is patterned after the Locus of Control Scale developed and presented in Rotter, JB (1966), 'Generalized expectancies for internal versus external control of reinforcement', Psychological Monographs, 80 (Whole No. 609).

**Benefits of an Internal Locus of Control**

In general, people with an internal locus of control:

- Engage in activities that will improve their situation.
- Emphasize striving for achievement.
- Work hard to develop their knowledge, skills and abilities.
- Are inquisitive, and try to figure out why things turned out the way they did.
- Take note of information that they can use to create positive outcomes in the future.
- Have a more participative management style.

## Managing the Drawbacks of a Strong Internal Locus of Control

People with an internal locus of control are generally more successful, for very good reasons.

However there can be times when having an external locus of control can be an advantage, particularly in situations where people need to be considerate and more easy-going. People with a strong internal locus of control tend to be very achievement-oriented, and this can leave people around them feeling 'trampled' or 'bruised.' And with a very strong internal locus of control, there is also a tendency to want to control everything, and this can lead to difficulties in taking direction.

If you have a strong internal locus of control, make sure you pay attention to the feelings of people around you - otherwise you'll seem arrogant, and people may not want to work with you.

Also, make sure that you [manage risks](#) properly. Random events do occur for all sorts of reasons. While you can manage many of these with enough determination and hard work, some you can't.

### Note:

As people grow older they tend towards a more internal locus of control. This comes from the increased ability to influence things going on in their lives and the realization that much of what happens to them is a result of what they do.

## Tips for Developing an Internal Locus of Control

Recognize the basic fact that you always have a choice. Making no choice is actually a choice in and of itself, and it's your choice to allow other people or events decide for you.

Set [goals](#) for yourself and note how, by working towards these and achieving these, you are controlling what happens in your life. As you do this, you'll find that your [self-confidence](#) quickly builds. (This is something we deal with in great detail within our [Life Plan Workbook](#) goal-setting and life-design program.)

Develop your [decision making](#) and [problem solving](#) skills so that you can feel more confident, and in control of what happens. With these tools, you'll find that you can understand and navigate through situations that would otherwise damage you.

Pay attention to your [self-talk](#). When you hear yourself saying things like, 'I have no choice' or 'There's nothing I can do', step back and remind yourself that you do, in fact, have some degree of control. It's your choice whether you exercise it or not.

## Key Points

Your locus of control says a lot about how you view the world and your role in determining the course of your life.

When you believe you have the power to control your own destiny and determine your own direction, you have a strong internal locus of control. In most cases, this is an important attitude to have if you want to be successful.

People with an internal locus of control tend to work harder and persevere longer in order to get what they want. This is not to say that having an external locus of control is always bad: There are some situations where this approach can work well. The key for your own personal development is to understand your natural tendency and then adapting it to the situations you are faced with.

## 7.15 The Wheel of Life (Also called the 'Life Wheel')

Worksheet

### Finding balance in your life

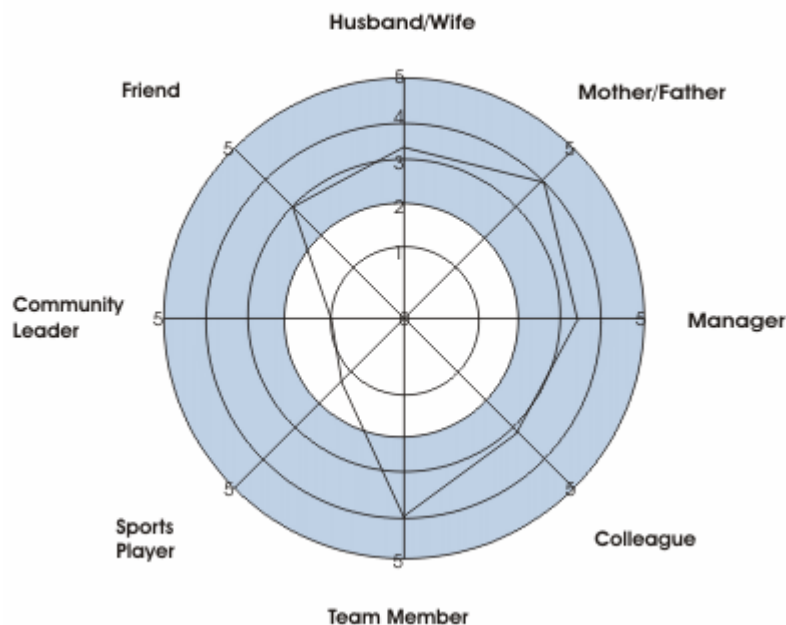
When life is busy, or all your energy is focused on a special project, it's all too easy to find yourself 'off balance', not paying enough attention to important areas of your life. While you need to have drive and focus if you're going to get things done, taking this too far can lead to frustration and intense stress.

That's when it's time to take a 'helicopter view' of your life, so that you can bring things back into balance.

This is where the Wheel of Life (or Life Wheel) can help. Commonly used by professional life coaches, it helps you consider each area of your life in turn and assess what's off balance. And so, it helps you identify areas that need more attention.

Figure 1 below shows an example wheel of life with example 'dimensions' (we'll explain how to choose the right areas of life or dimensions for yourself below).

Figure 1: Wheel of Life Example



The Wheel of Life is powerful because it gives you a vivid visual representation of the way your life is currently, compared with the way you'd ideally like it to be. It is called the 'Wheel of Life' because each area of your life is mapped on a circle, like the spoke of a wheel.

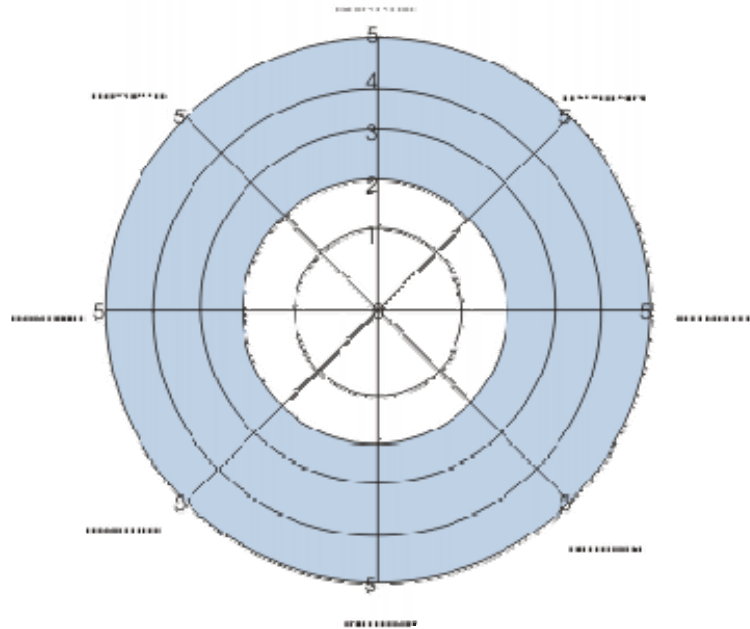
### Using the Tool

There are two ways you can use this tool. One is to use our online interactive Wheel of Life tool [here](#).

Alternatively, use the following steps to create your Wheel of Life and assess your balance. (This allows you to define your own dimensions.)

Start by downloading our free [Wheel of Life worksheet](#) or getting a blank Wheel of Life template from your *Worksheets and Templates Supplement*. This contains a blank Wheel of Life diagram as shown in figure 2, below.

Figure 2: Wheel of Life Template



1. Start by brainstorming the 6 to 8 dimensions of your life that are important for you. Different approaches to this are:
  - **The roles you play in life**, for example: husband/wife, father/mother, manager, colleague, team member, sports player, community leader, or friend;
  - **Areas of life that are important to you**, for example: artistic expression, positive attitude, career, education, family, friends, financial freedom, physical challenge, pleasure, or public service; or
  - **Your own combination of these (or different) things**, reflecting the things that are your priorities in life.
2. Write down these dimensions down on the Wheel of Life diagram, one on each spoke of the life wheel.
3. This approach assumes that you will be happy and fulfilled if you can find the right balance of attention for each of these dimensions. And different areas of your life will need different levels of attention at different times. So the next step is to assess the amount of attention you're currently devoting to each area.

Consider each dimension in turn, and on a scale of 0 (low) to 5 (high), write down the amount of attention you're devoting to that area of your life. Mark each score on the appropriate spoke of you Life Wheel.

4. Now join up the marks around the circle. Does you life wheel looked and feel balanced?

5. Next it's time to consider your ideal level in each area of your life. A balanced life does not mean getting 5 in each life area: some areas need more attention and focus than others at any time. And inevitably you will need to make choices and compromises, as your time and energy are not in unlimited supply!

So the question is, what would the ideal level of attention be for you each life area?

Plot the 'ideal' scores around your life wheel too.

6. Now you have a visual representation of your current life balance and your ideal life balance. What are the gaps? These are the areas of your life that need attention.

And remember that gaps can go both ways. There are almost certainly areas that are not getting as much attention as you'd like. However there may also be areas where you're putting in more effort than you'd ideally like. These areas are sapping energy and enthusiasm that may better be directed elsewhere.

7. Once you have identified the areas that need attention, it's time to plan the actions needed to work on regaining balance. Starting with the neglected areas, what things do you need to start doing to regain balance? In the areas that currently sap your energy and time, what can you STOP doing or reprioritize or delegate to someone else? Make a commitment to these actions by writing them on your [worksheet](#).

**Tip:**

You can use the Wheel of Life as preparation for [coaching](#) or [goal setting](#). It helps identify the area you want to work on and is a great way of visualizing your current and desired life. Once you are working on improving your life balance, it's also a useful tool for monitoring how it changes over time.

The Wheel of Life is a great tool to help you improve your life balance. It helps you quickly and graphically identify the areas in your life to which you want to devote more energy, and helps you understand where you might want to cut back.

The challenge now is to transform this knowledge and desire for a more balanced life into a positive program of action.



## Section 8: Information Skills

- Effective Note-Taking with Mind Maps
- SQ3R – Increasing your retention of written information
- Speed Reading – Substantially increase your reading speed
- Reading Strategies – Reading efficiently by reading intelligently
- Reviewing Learned Information – Keeping knowledge 'fresh'
- Learning Styles – Learn in a way that suits you
- The Conscious Competence Ladder – Making learning a happier experience

## 8. Introduction to Information Skills

The techniques in this section help you to manage information better. By using them you will be able to improve:

- Your reading skills, so that you can find the information you need quickly and easily
- The way you make notes, so that they become clear and easy to understand, and quick to review
- Your review techniques, so that you can keep information fresh in your mind.

These techniques will help you to assimilate information quickly. This may involve keeping yourself up-to-date on events within your field, absorbing information within reports or learning specialist information needed to complete a project.

These are also very useful tools for mastering course material where you are studying for exams.

They work particularly well in conjunction with the mnemonics described in the Mind Tools [Memory Techniques](#) section – used together these two sets of tools will give you a formidable advantage in organizing and remembering information. This is often what exams are about.

Techniques discussed are:

- How to take notes effectively – [Mind Maps](#).
- Fully absorbing written information – [SQ3R](#).
- [Speed Reading](#).
- Reading faster by thinking what to read – [Reading Strategies](#).
- Keeping information fresh in your mind – [Review Techniques](#).
- Learn in a way that suits you – [Learning Styles](#).

Mind Maps are powerful tools for recording and organizing information. They do this in a format that is easy to review. Once you understand and start using Mind Maps, you will never again want to take notes using conventional techniques.

The next three techniques (SQ3R, Speed Reading and use of Reading Strategies) help you to assimilate and understand written information quickly and efficiently.

The section on Review Techniques will help you to keep information that you have already learned alive in your mind.

Finally, the article on Learning Styles will not only help you develop the ways in which you can learn, but you'll be able to tailor what you do so that others can learn from you more effectively.

## 8.1 Mind Maps

### A powerful approach to note taking

**Related variants: Spray Diagrams, Spider Diagrams, Spidograms, Spidergrams and Mindmaps**

*Mind Map® is a trade mark of the Buzan Organization.*

Mind Mapping is a useful technique that improves the way you take notes, and supports and enhances your creative problem solving.

By using Mind Maps, you can quickly identify and understand the structure of a subject, and the way that pieces of information fit together, as well as recording the raw facts contained in normal notes.

More than this, Mind Maps encourage [creative problem solving](#), and they hold information in a format that your mind finds easy to remember and quick to review.

Popularized by Tony Buzan, Mind Maps abandon the list format of conventional note taking. They do this in favor of a two-dimensional structure. As such, a good Mind Map shows the 'shape' of the subject, the relative importance of individual points, and the way in which facts relate to one another.

Mind Maps are more compact than conventional notes, often taking up one side of paper. This helps you to make associations easily. And if you find out more information after you have drawn the main Mind Map, then you can easily add it in.

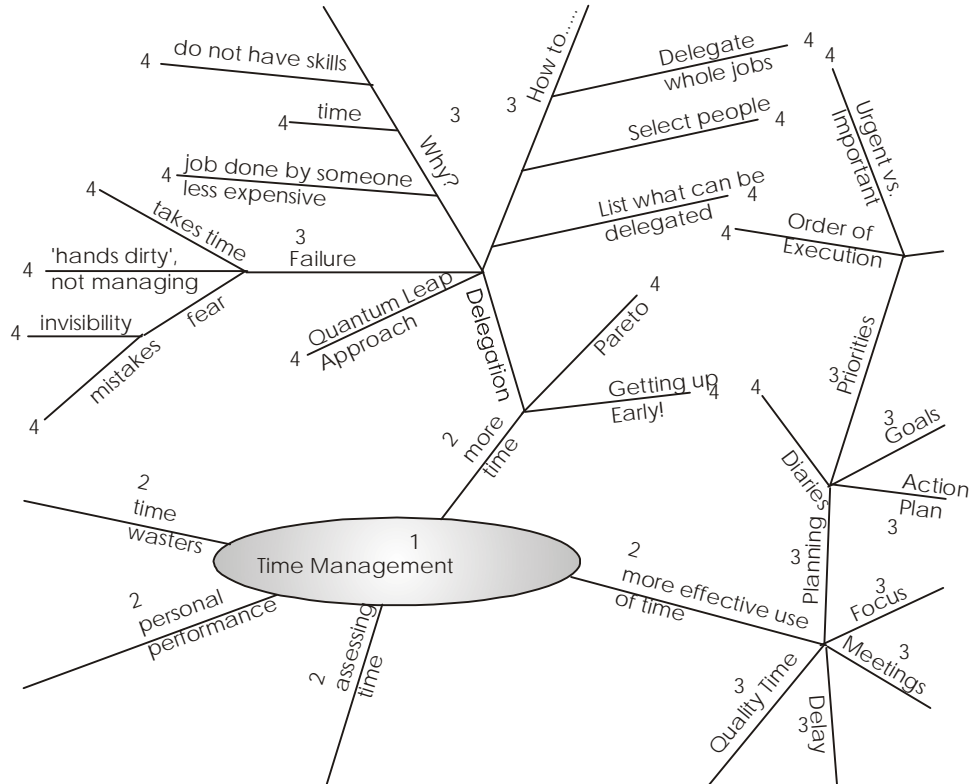
Mind Maps are also useful for:

- Summarizing information;
- Consolidating information from different research sources;
- Thinking through complex problems; and
- Presenting information in a format that shows the overall structure of your subject.

What's more, they are very quick to review as you can often refresh information in your mind just by glancing at one. In the same way, they can be effective mnemonics: Remembering the shape and structure of a Mind Map can give you the cues you need to remember the information within it. As such, they engage much more of your brain in the process of assimilating and connecting facts, compared with conventional notes.

### Drawing Simple Mind Maps

The original Mind Tools site was planned and researched using Mind Maps. They are too large to publish here, however part of one is shown on the next page. This shows research into [time management](#) skills:

**Figure 1: An Example Mind Map**

To make notes on a subject using a Mind Map, draw it in the following way:

1. Write the title of the subject you're exploring in the center of the page, and draw a circle around it. This is shown by the circle marked 1 in Figure 1, above.
2. As you come across major subdivisions or subheadings of the topic (or important facts that relate to the subject) draw lines out from this circle. Label these lines with these subdivisions or subheadings. These are shown by the lines marked 2 in Figure 1.
3. As you 'burrow' into the subject and uncover another level of information (further subheadings, or individual facts) belonging to the subheadings above, draw these as lines linked to the subheading lines. These are shown by the lines marked 3 in Figure 1.
4. Finally, for individual facts or ideas, draw lines out from the appropriate heading line and label them. These are shown by the lines marked 4 in Figure 1.

As you come across new information, link it in to the Mind Map appropriately.

A complete Mind Map may have main topic lines radiating in all directions from the center. Sub-topics and facts will branch off these, like branches and twigs from the trunk of a tree. You do not need to worry about the structure produced, as this will evolve as you develop your mind map.

*Note that the idea of numbered 'levels' in Figure 1 is only used to explain how the Mind Map was created. All we are showing is that major headings radiate from the center, with lower level headings and facts branching off from the higher level headings.*



## 8.2 SQ3R

### Increasing your retention of written information

SQ3R is a useful technique for fully absorbing written information. It helps you to create a good mental framework of a subject, into which you can fit facts correctly. It helps you to set study [goals](#). It also prompts you to use the review techniques that will help to fix information in your mind.

By using SQ3R to actively read a document, you can get the maximum benefit from your reading time.

#### How to Use the Tool

The acronym SQ3R stands for the five sequential techniques you should use to read a book:

##### **Survey:**

Survey the document: scan the contents, introduction, chapter introductions and chapter summaries to pick up a shallow overview of the text. Form an opinion of whether it will be of any help. If it does not give you the information you want, discard it.

##### **Question:**

Make a note of any questions on the subject that come to mind, or particularly interest you following your survey. Perhaps scan the document again to see if any stand out. These questions can be considered almost as study goals – understanding the answers can help you to structure the information in your own mind.

##### **Read:**

Now read the document. Read through useful sections in detail, taking care to understand all the points that are relevant. In the case of some texts this reading may be very slow. This will particularly be the case if there is a lot of dense and complicated information. While you are reading, it can help to take notes in [Concept Map](#) format.

##### **Recall:**

Once you have read appropriate sections of the document, run through it in your mind several times. Isolate the core facts or the essential processes behind the subject, and then see how other information fits around them.

##### **Review:**

Once you have run through the exercise of recalling the information, you can move on to the stage of reviewing it. This review can be by rereading the document, by expanding your notes, or by discussing the material with colleagues. A particularly effective method of reviewing information is to have to teach it to someone else!

#### Key Points

SQ3R is a useful technique for extracting the maximum amount of benefit from your reading time. It helps you to organize the structure of a subject in your mind. It also helps you to set study goals and to separate important information from irrelevant data.

SQ3R is a five-stage active reading technique. The stages are:

1. Survey
2. Question
3. Read
4. Recall
5. Review

If you use SQ3R, you will significantly improve the quality of your study time.

## 8.3 Speed Reading

### Radically increasing your reading speed

Speed Reading can help you to read and understand written information much more quickly. This makes it an essential skill in any environment where you have to master large volumes of information quickly, as is the norm in fast-moving professional environments. What's more, it's a key technique to learn if you suffer from 'information overload', because it helps you to become much more discriminating about the information that you consume.

#### The Key Insight

The most important trick about speed reading is to know what information you want from a document before you start reading it. If you only want an outline of the issue that the document discusses, then you can skim the document quickly and extract only the essential facts. If you need to understand the real detail of the document, then you need to read it slowly enough to gain the full understanding you need.

You will get the greatest time savings from speed reading by learning to skim excessively detailed documents, although the techniques you'll learn will help you improve the speed of all the reading you do.

#### Technical Issues

Even when you know how to ignore irrelevant detail, there are other technical improvements you can make to your reading style which will increase your reading speed.

Most people learn to read the way young children read – either letter-by-letter, or word-by-word. As an adult, this is probably not the way you read now: Just think about how your eye muscles are moving as you read this. You will probably find that you are fixing your eyes on one block of words, then moving your eyes to the next block of words, and so on. You are reading blocks of words at a time, not individual words one-by-one. You may also notice that you do not always go from one block to the next: sometimes you may move back to a previous block if you are unsure about something.

A skilled reader will read many words in each block. He or she will only dwell on each block for an instant, and will then move on. Only rarely will the reader's eyes skip back to a previous block of words. This reduces the amount of work that the reader's eyes have to do. It also increases the volume of information that can be assimilated in a given period of time.

A poor reader will become bogged down, spending a lot of time reading small blocks of words. He or she will skip back often, losing the flow and structure of the text, and confusing his or her overall understanding of the subject. This irregular eye movement makes reading tiring. Poor readers tend to dislike reading, and they may find it harder to concentrate, and understand written information.

#### How to Use Tool:

Speed reading aims to improve reading skills by:

- Increasing the number of words read in each block.
- Reducing the length of time spent reading each block.



- And reducing the number of times your eyes skip back to a previous sentence.

These are explained below:

**Increasing the number of words in each block:**

This needs a conscious effort. Try to expand the number of words that you read at a time: With practice, you'll find you read faster. You may also find that you can increase the number of words in each block by holding the text a little further from your eyes. The more words you can read in each block, the faster you will read!

**Reducing fixation time:**

The minimum length of time needed to read each block is probably only a quarter of a second. By pushing yourself to reduce the time you take, you will get better at picking up information quickly. Again, this is a matter of practice and confidence.

**Reducing skip-back:**

To reduce the number of times that your eyes skip back to a previous sentence, run a pointer along the line as you read. This could be a finger, or a pen or pencil. Your eyes will follow the tip of your pointer, smoothing the flow of your reading. The speed at which you read using this method will largely depend on the speed at which you move the pointer.

You will be able to increase your reading speed a certain amount on your own by applying these speed reading techniques.

What you don't get out of self-study is the use of specialist reading machines and the confidence gained from successful speed-reading – this is where a good one-day course can revolutionize your reading skills.

**Key Points**

By speed reading you can read information more quickly. You may also get a better understanding of it, as you will hold more of it in short term memory.

To improve the speed of your reading, read more words in each block and reduce the length of time spent reading each block. Use a pointer to smooth the way your eyes move and reduce skip-back.

## 8.4 Reading Strategies

### Reading efficiently by reading intelligently

Good reading strategies help you to read in a very efficient way. Using them, you aim to get the maximum benefit from your reading with the minimum effort. This section will show you how to use six different strategies to read intelligently.

**Strategy 1: Knowing what you want to know**

The first thing to ask yourself is: Why you are reading the text? Are you reading with a purpose or just for pleasure? What do you want to know after reading it?

Once you know this, you can examine the text to see whether it is going to move you towards this goal.

An easy way of doing this is to look at the introduction and the chapter headings. The introduction should let you know whom the book is targeted at, and what it seeks to achieve. Chapter headings will give you an overall view of the structure of the subject.

Ask yourself whether the book meets your needs. Ask yourself if it assumes too much or too little knowledge. If the book isn't ideal, would it be better to find a better one?

### **Strategy 2: Knowing how deeply to study the material**

Where you only need the shallowest knowledge of the subject, you can skim material. Here you read only chapter headings, introductions and summaries.

If you need a moderate level of information on a subject, then you can scan the text. Here you read the chapter introductions and summaries in detail. You may then [speed read](#) the contents of the chapters, picking out and understanding key words and concepts. At this level of looking at the document it is worth paying attention to diagrams and graphs.

Only when you need detailed knowledge of a subject is it worth studying the text. Here it is best to skim the material first to get an overview of the subject. This gives you an understanding of its structure, into which you can fit the detail gained from a full, receptive reading of the material. [SQ3R](#) is a good technique for getting a deep understanding of a text.

### **Strategy 3: Active reading**

When you are reading a document in detail, it often helps if you highlight, underline and annotate it as you go on. This emphasizes information in your mind, and helps you to review important points later.

Doing this also helps to keep your mind focused on the material and stops it wandering.

This is obviously only something to do if you own the document! If you own the book and find that active reading helps, then it may be worth photocopying information in more expensive texts. You can then read and mark the photocopies.

If you are worried about destroying the material, ask yourself how much your investment of time is worth. If the benefit you get by active reading reasonably exceeds the value of the book, then the book is disposable.

### **Strategy 4: How to study different sorts of material**

Different sorts of documents hold information in different places and in different ways. They have different depths and breadths of coverage. By understanding the layout of the material you are reading, you can extract useful information much more efficiently.

#### **Reading Magazines and Newspapers:**

These tend to give a very fragmented coverage of an area. They will typically only concentrate on the most interesting and glamorous parts of a topic – this helps them to sell copies! They will often ignore less interesting information that may be essential to a full understanding of a subject. Typically areas of useful information are padded out with large amounts of irrelevant waffle or with advertising.

The most effective way of getting information from magazines is to scan the contents tables or indexes and turn directly to interesting articles. If you find an article useful, then cut it out and file it in a folder specifically covering that sort of information. In this way you will build up sets of related articles that may begin to explain the subject.

Newspapers tend to be arranged in sections. If you read a paper often, you can learn quickly which sections are useful and which ones you can skip altogether.

**Reading Individual Articles:**

Articles within newspapers and magazines tend to be in three main types:

**News Articles:**

Here the most important information is presented first, with information being less and less useful as the article progresses. News articles are designed to explain the key points first, and then flesh them out with detail.

**Opinion Articles:**

Opinion articles present a point of view. Here the most important information is contained in the introduction and the summary, with the middle of the article containing supporting arguments.

**Feature Articles:**

These are written to provide entertainment or background on a subject. Typically the most important information is in the body of the text.

If you know what you want from an article, and recognize its type, you can extract information from it quickly and efficiently.

**Strategy 5: Reading 'whole subject' documents**

When you are reading an important document, it is easy to accept the writer's structure of thought. This can mean that you may not notice that important information has been omitted or that irrelevant detail has been included. A good way of recognizing this is to compile your own table of contents before you open the document. You can then use this table of contents to read the document in the order that you want. You will be able to spot omissions quickly.

**Strategy 6: Using glossaries with technical documents**

If you are reading large amounts of difficult technical material, it may be useful to photocopy or compile a glossary. Keep this beside you as you read. It will probably also be useful to note down the key concepts in your own words, and refer to them when necessary.

Usually it is best to make notes as you go. Effective ways of doing this include creating [Concept Maps](#) or using the [Cornell Note Taking System](#).

**Key Points**

This section shows six different strategies and techniques that you can use to read more effectively.

These are:

1. Knowing what you need to know, and reading appropriately.
2. Knowing how deeply to read the document: skimming, scanning or studying.
3. Using active reading techniques to pick out key points and keep your mind focused on the material.
4. Understanding how to extract information from different article types.
5. Creating your own table of contents for reviewing material.
6. Using indexes, tables of contents, and glossaries to help you assimilate technical information.

## 8.5 Review Techniques

### Keeping knowledge in your short-term memory

Normally people's memories of things they have learned are clearest immediately after they have learned them. They will then forget more and more knowledge as time goes on. After a few months they may only be able to recall only a tiny percentage of what was initially learned. This makes relearning information difficult when it needs to be done.

If you review knowledge frequently, however, then you will be able to keep it fresh and alive in your mind. This makes it easy to recall when you need it with a minimum of effort.

This section explains how to review material in a structured and effective way.

#### How to Use the Tool

The first step is to spend a few minutes reviewing material immediately after the learning session. This helps you to:

- Confirm that you understand the material
- Reduce the time needed to relearn information when you need it, and
- Improve the quality of future learning, by building on a well-remembered foundation. This helps your mind to make connections and linkages that it would not otherwise make.

A good way of carrying out this review is to rewrite or tidy up notes. You can do this effectively by putting the information learned into a [Concept Map](#).

After this, reviewing information should be relatively easy and need not take long. Carry out reviews at the following times:

- After one day
- After one week
- After one month
- After four months

Review the topic by taking a few minutes to jot down everything you can remember about the subject, and compare this with your notes.

If you review information often, it should stay fresh in your mind, and will be easily accessible when you need it.

#### Key Points

By reviewing information you avoid forgetting information that will be difficult and time-consuming to relearn. You also ensure that you keep information fresh in your mind so that it acts as a foundation for future learning.

The first stage in reviewing information is to rewrite and tidy up notes immediately after learning has taken place. This confirms the structure and detail of information in your mind.

After this, periodically jot down what you can remember on a subject and compare it with your notes. This will show you what you have forgotten and refresh your memory.

## 8.6 Learning Styles

### Learn effectively by understanding your learning preferences

Have you ever tried to learn something fairly simple, yet failed to grasp the key ideas? Or tried to teach people and found that some were overwhelmed or confused by something quite basic?

If so, you may have experienced a clash of learning styles: Your learning preferences and those of your instructor or audience may not have been aligned. When this occurs, not only is it frustrating for everyone, the communication process breaks down and learning fails.

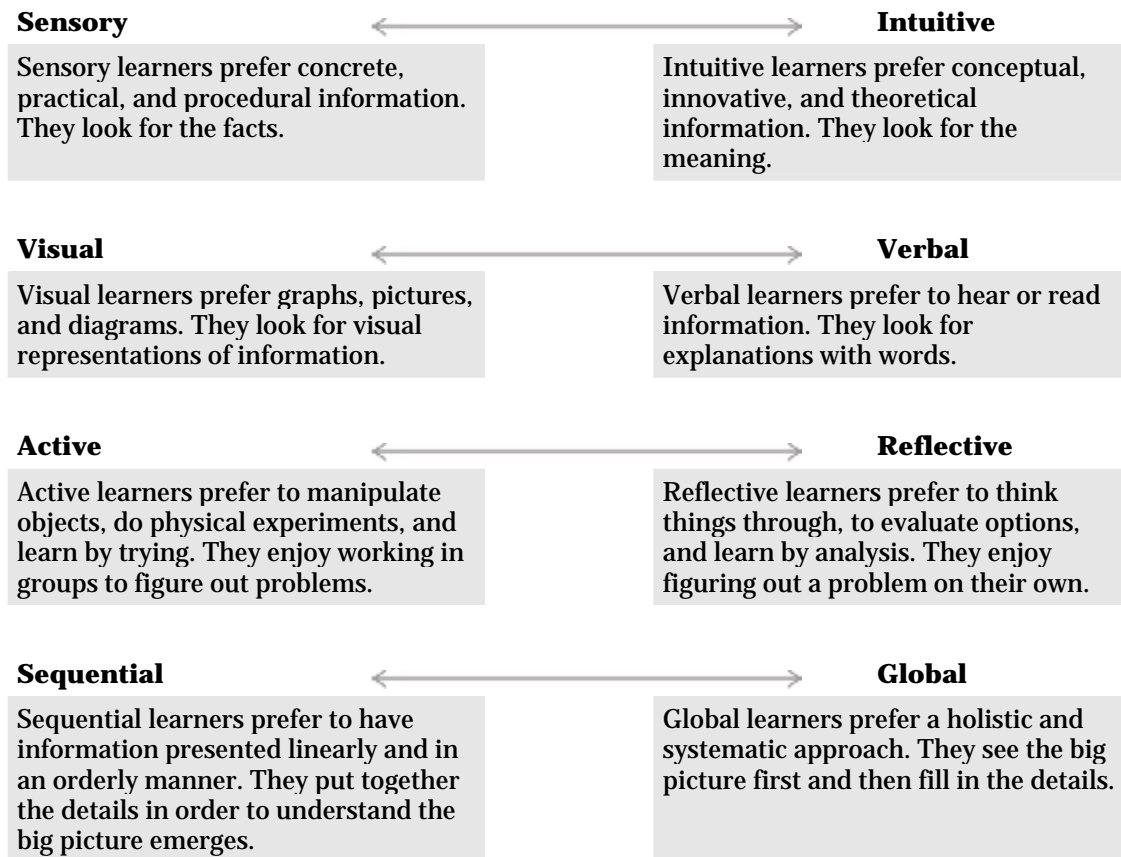
Once you know your own natural learning preference, you can work on expanding the way you learn, so that you can learn in other ways, not just in your preferred style.

And, by understanding learning styles, you can learn to create an environment in which everyone can learn from you, not just those who use your preferred style.

#### Felder and Silverman's Index of Learning Styles

One of the most widely used models of learning styles is the **Index of Learning Styles** developed by Richard Felder and Linda Silverman in the late 1980s. According to this model (which Felder revised in 2002) there are four dimensions of learning styles. Think of these dimensions as a continuum with one learning preference on the far left and the other on the far right.

**Figure 1: Learning Styles Index**



Once you know where your preferences lie on each of these dimensions, you can begin to stretch beyond those preferences and develop a more balanced approach to learning. Not only will you improve your learning effectiveness, you will open yourself up to many different ways of perceiving the world.

**Tip:**

This article describes one useful approach to learning styles. Other practitioners have different approaches.

See our article on [4MAT](#) to find out about other useful approaches: Those of David Kolb, and of Peter Honey and Alan Mumford. And click [here](#) to find out about other styles.

Balance is key. You don't want to get too far on any one side of the learning dimensions. When you do that you limit your ability to take in new information and make sense of it quickly, accurately, and effectively.

### Using the Learning Style Index

You can use the learning style index to develop your own learning skills and also to help you create a rounded learning experience for other people.

#### (I) Developing Your Learning Skills

**Step One:**

Identify your learning preferences for each learning dimension. Read through the explanations of each learning preference and choose the one that best reflects your style. Alternatively, use an Index of Learning Styles Questionnaire like the one at <http://www.engr.ncsu.edu/learningstyles/ilsweb.html>.

**Step Two:**

Analyze your results and identify those dimensions where you are 'out of balance,' meaning you have a very strong preference for one style and dislike the other.

**Step Three:**

For each out of balance area, use the information in figure 2 to improve your skills in areas where you need development.

**Figure 2: Bringing Your Learning Styles Into Balance**

**Sensory Learners** – if you rely too much on sensing, you can tend to prefer what is familiar, and concentrate on facts you know instead of being innovative and adapting to new situations. Seek out opportunities to learn theoretical information and then bring in facts to support or negate these theories.

**Intuitive Learners** – if you rely too much on intuition you risk missing important details, which can lead to poor decision-making and problem solving. Force yourself to learn facts or memorize data that will help you defend or criticize a theory or procedure you are working with. You may need to slow down and look at detail you would otherwise typically skim.

**Continued**

**Visual Learners** – if you concentrate more on pictorial or graphical information than on words, you put yourself at a distinct disadvantage because verbal and written information is still the main preferred choice for delivery of information. Practice your note taking and seek out opportunities to explain information to others using words.

**Verbal Learners** – when information is presented in diagrams, sketches, flow charts, and so on, it is designed to be understood quickly. If you can develop your skills in this area you can significantly reduce time spent learning and absorbing information. Look for opportunities to learn through audio-visual presentations (such as CD-ROM and Webcasts.) When making notes, group information according to concepts and then create visual links with arrows going to and from them. Take every opportunity you can to create charts and tables and diagrams.

**Active Learners** – if you act before you think you are apt to make hasty and potentially ill-informed judgments. You need to concentrate on summarizing situations, and taking time to sit by yourself to digest information you have been given before jumping in and discussing it with others.

**Reflective Learners** – if you think too much you risk doing nothing... ever. There comes a time when a decision has to be made or an action taken. Involve yourself in group decision-making whenever possible and try to apply the information you have in as practical a manner as possible.

**Sequential Learners** – when you break things down into small components you are often able to dive right into problem solving. This seems to be advantageous but can often be unproductive. Force yourself to slow down and understand why you are doing something and how it is connected to the overall purpose or objective. Ask yourself how your actions are going to help you in the long run. If you can't think of a practical application for what you are doing then stop and do some more 'big picture' thinking.

**Global Learners** – if grasping the big picture is easy for you, then you can be at risk of wanting to run before you can walk. You see what is needed but may not take the time to learn how best to accomplish it. Take the time to ask for explanations, and force yourself to complete [all problem-solving steps](#) before coming to a conclusion or making a decision. If you can't explain what you have done and why, then you may have missed critical details.

## (II) Creating a Rounded Learning Experience for Others

Whenever you are training or communicating with others, you have information and ideas that you want them to understand and learn effectively and efficiently. Your audience is likely to demonstrate a wide range of learning preferences, and your challenge is to provide variety that helps them learn quickly and well.

Your preferred teaching and communication methods may in fact be influenced by your own learning preferences. For example, if you prefer visual rather than verbal learning, you may in turn tend to provide a visual learning experience for your audience.

Be aware of your preferences and the range of preference of your audiences. Provide a balanced learning experience by:

**Sensory – Intuitive:** Provide both hard facts and general concepts.

**Visual – Verbal:** Incorporate both visual and verbal cues.

**Active – Reflective:** Allow both experiential learning and time for evaluation and analysis.



**Sequential – Global:** Provide detail in a structured way, as well as the big picture.

### Key Points

Learning styles and preferences vary for each of us and in different situations.

By understanding this, and developing the skills that help you learn in a variety of ways, you make the most of your learning potential. And because you're better able to learn and gather information, you'll make better decisions and choose better courses of action.

And by understanding that other people can have quite different learning preferences, you can learn to communicate your message effectively in a way that many more people can understand. This is fundamentally important, particularly if you're a professional for whom communication is an important part of your job.

Take time to identify how you prefer to learn and then force yourself to break out of your comfort zone. Once you start learning in new ways you'll be amazed at how much more you catch and how much easier it is to assimilate information and make sense of what is going on.

## 8.7 The Conscious Competence Ladder

### Making learning a happier experience

*Also called the 'Conscious Competence Matrix' and the 'Learning Matrix'*

When we find that we don't know something important, we're often motivated to learn more. However if we're blissfully unaware of our ignorance, there's little we can do about it.

One of the first steps on the journey to acquiring new skills is therefore to be aware of what you don't know. This discovery can be uncomfortable, as can be the experience of not being very good at what you're trying to do (as you won't be, when you first start to learn.)

The Conscious Competence Ladder is a popular and intuitive approach (attributed to many different possible originators) that helps us manage our own emotions during a sometimes dispiriting learning process. More than this, it helps us to be more in touch with the emotions of the people we are teaching, so we can better coach them through the learning process.

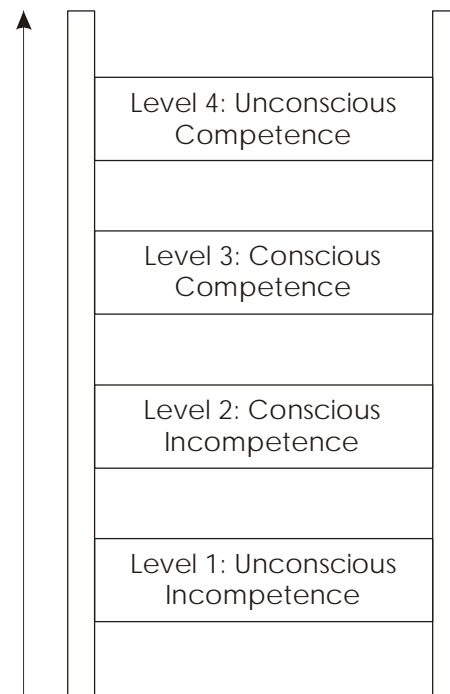
#### Explaining the Model:

According to this approach, consciousness is the first step towards gaining knowledge. To learn new skills and to gain knowledge you need to be conscious of what you do and do not know.

Next, competence is your ability to do things. You may be highly competent in one area, but have no skill in another. Your competence level will depend on the task or job at hand.

The idea is that as you build expertise in a new area, you move from 'unconscious incompetence' to 'conscious incompetence' and then to 'conscious competence', finally reaching 'unconscious competence.' These are explained below, and this 'ladder' of learning is shown in figure 1.

**Figure 1:  
The Conscious Competence Ladder**



**Level 1 – Unconscious Incompetence  
(You Don't Know that You Don't Know)**

At this level you are blissfully ignorant: You have a complete lack of knowledge and skills in the subject in question. On top of this, you are unaware of this lack of skill, and your confidence may therefore far exceed your abilities.

**Level 2 – Conscious Incompetence  
(You Know that You Don't Know)**

At this level you find that there are skills you need to learn, and you may be shocked to discover that there are others who are much more competent than you. As you realize that your ability is limited, your confidence drops. You go through an uncomfortable period as you learn these new skills when others are much more competent and successful than you are.

**Level 3 – Conscious Competence  
(You Know that You Know)**

At this level you acquire the new skills and knowledge. You put your learning into practice and you gain confidence in carrying out the tasks or jobs involved. You are aware of your new skills and work on refining them.

You are still concentrating on the performance of these activities, but as you get ever-more practice and experience, these become increasingly automatic.

**Level 4 – Unconscious Competence  
(You Don't Know that You Know – It Just Seems Easy!)**

At this level your new skills become habits, and you perform the task without conscious effort and with automatic ease. This is the peak of your confidence and ability.

**Tip:**

Some people prefer to think of this as a matrix (hence 'Conscious Competence Matrix' or 'Learning Matrix') with Incompetence/Competence on the horizontal axis, and Unconscious/Conscious on the vertical axis

Some people prefer to think of this as a matrix (hence 'Conscious Competence Matrix' or 'Learning Matrix') with Incompetence/Competence on the horizontal axis, and Unconscious/Conscious on the vertical axis

**Using the Tool:**

The Conscious Competence Ladder helps us in two ways: It gives us reassurance when we need it, and it helps us coach others through a sometimes difficult learning process.

During the Conscious Incompetence phase, we have the reassurance that while things are difficult and frustrating right now, things will get much better in the future. And when we're at the stage of Unconscious Competence, the model reminds us to value the skills we have so painstakingly acquired.

As an approach to coaching others, it reminds us that people may be moving through these steps as they learn the new skills we're trying to teach them:

- **Unconscious Incompetence:** At the beginning of the process, they may be unaware of their own lack of competence, and may need to be made gently aware of how much they need to learn.
- **Conscious Incompetence:** During this stage, you'll need to provide plenty of encouragement, tolerate mistakes appropriately, and do what you can to help people improve.
- **Conscious Competence:** At this stage you need to keep people focused on effective performance of the task, and give plenty of opportunities for them to get practice.
- **Unconscious Competence:** Although this is the ideal state, you'll need to make sure that people avoid complacency, and stay abreast of their fields. You may also need to remind people how difficult it was to reach this state, so that they are tolerant with people at the Conscious Incompetence stage!

## 8.8 Memory Improvement Techniques

It's a classic situation - you meet someone new, and then moments later you've forgotten their name! Names, passwords, pin and telephone numbers... the list is endless - with so much to memorize is it really possible to improve how much you can remember?

The good news is "yes"! Just like every muscle in your body, the adage "use it or lose it" applies, so the more you exercise your brain, the more you will remember.

## Mnemonics

'Mnemonic' is another word for memory tool. Mnemonics are techniques for remembering information that is otherwise quite difficult to recall: A very simple example is the '30 days hath September' rhyme for remembering the number of days in each calendar month.

The idea behind using mnemonics is to encode difficult-to-remember information in a way that is much easier to remember.

Our brains evolved to code and interpret complex stimuli such as images, colors, structures, sounds, smells, tastes, touch, positions, emotions and language. We use these to make sophisticated models of the world we live in. Our memories store all of these very effectively.

Unfortunately, a lot of the information we have to remember in modern life is presented differently – as words printed on a page. While writing is a rich and sophisticated medium for conveying complex arguments, our brains do not easily encode written information, making it difficult to remember.

## Using Your Whole Mind to Remember

The key idea is that by coding information using vivid mental images, you can reliably code both information and the structure of information. And because the images are vivid, they are easy to recall when you need them.

The techniques explained later on in this section show you how to code information vividly, using stories, strong mental images, familiar journeys, and so on.

You can do the following things to make your mnemonics more memorable:

- Use positive, pleasant images. Your brain often blocks out unpleasant ones
- Use vivid, colorful, sense-laden images – these are easier to remember than drab ones
- Use all your senses to code information or dress up an image. Remember that your mnemonic can contain sounds, smells, tastes, touch, movements and feelings as well as pictures.
- Give your image three dimensions, movement and space to make it more vivid. You can use movement either to maintain the flow of association, or to help you to remember actions.
- Exaggerate the size of important parts of the image
- Use humor! Funny or peculiar things are easier to remember than normal ones.
- Similarly, rude rhymes are very difficult to forget!
- Symbols (red traffic lights, pointing fingers, road signs, etc.) can code quite complex messages quickly and effectively

## Designing Mnemonics: Imagination, Association and Location

The three fundamental principles underlying the use of mnemonics are imagination, association and location. Working together, you can use these principles to generate powerful mnemonic systems.

*Imagination:* is what you use to create and strengthen the associations needed to create effective mnemonics. Your imagination is what you use to create mnemonics that are potent for you. The more strongly you imagine and visualize a situation, the more effectively it will stick in your mind for later recall. The imagery you use in your mnemonics can be as violent, vivid, or sensual as you like, as long as it helps you to remember.

*Association:* this is the method by which you link a thing to be remembered to a way of remembering it. You can create associations by:

- Placing things on top of each other
- Crashing things together
- Merging images together
- Wrapping them around each other
- Rotating them around each other or having them dancing together
- Linking them using the same color, smell, shape, or feeling

As an example, you might link the number 1 with a goldfish by visualizing a 1-shaped spear being used to spear it.

*Location:* gives you two things: a coherent context into which you can place information so that it hangs together, and a way of separating one mnemonic from another. By setting one mnemonic in a particular town, I can separate it from a similar mnemonic set in a city. For example, by setting one in Wimbledon and another similar mnemonic with images of Manhattan, we can separate them with no danger of confusion. You can build the flavors and atmosphere of these places into your mnemonics to strengthen the feeling of location.

For a detailed explanation of how to use imagination, association and location mnemonics, try these articles:

- [The Link Method and Story Method](#) – Remembering a Simple List
- [The Number/Rhyme Mnemonic](#) – Remembering Ordered Lists
- [The Number/Shape Mnemonic](#) – Remembering Ordered Lists
- [The Alphabet Technique](#) – Remembering Middle Length Lists
- [The Journey System](#) – Remembering Long Lists
- [The Roman Room System](#) – Remembering Grouped Information
- [The Major System](#) – Remembering Very Long Numbers
- [Using Concept Maps to Remember Structured Information](#)
- [Memory Games](#) – Have fun while you improve your memory

## Section 9: Communication Skills

- Making a Great First Impression
- The Johari Window – Helping people understand one another
- Business Story Telling – Using stories to inspire
- Better Public Speaking – Ensure your words are always understood
- Speaking to an Audience – Communicate complex ideas successfully
- Presentation Planning Checklist
- Questioning Techniques – Asking questions effectively
- Active Listening – Hear what people are really saying
- Effective Email – How to communicate powerfully by email
- Writing Skills
- Charts and Graphs – Choosing the right format
- AIDA: Attention-Interest-Desire-Action - Inspiring action with your writing
- Running Effective Meetings
- Ice Breakers – Getting everyone to contribute at the start of a successful event
- Facilitation – Guiding an event through to a successful conclusion
- Win-Win Negotiation - Finding a fair compromise
- Hofstede's Cultural Dimensions – Understanding workplace values around the world

## 9. Introduction to Communication Skills

### Why you need to get your message across

Effective communication is all about conveying your messages to other people clearly and unambiguously. It's also about receiving information that others are sending to you, with as little distortion as possible.

Doing this involves effort from both the sender of the message and the receiver. And it's a process that can be fraught with error, with messages muddled by the sender, or misinterpreted by the recipient. When this isn't detected, it can cause tremendous confusion, wasted effort and missed opportunity.

In fact, communication is only successful when both the sender and the receiver understand the same information as a result of the communication.

By successfully getting your message across, you convey your thoughts and ideas effectively. When not successful, the thoughts and ideas that you actually send do not necessarily reflect what you think, causing a communications breakdown and creating roadblocks that stand in the way of your goals – both personally and professionally.

In a recent survey of recruiters from companies with more than 50,000 employees, communication skills were cited as the single more important decisive factor in choosing managers. The survey, conducted by the University of Pittsburgh's Katz Business School, points out that communication skills, including written and oral presentations, as well as an ability to work with others, are the main factor contributing to job success.

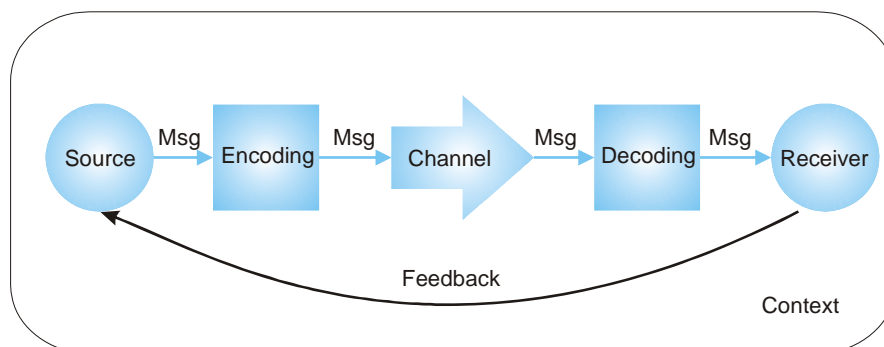
In spite of the increasing importance placed on communication skills, many individuals continue to struggle, unable to communicate their thoughts and ideas effectively – whether in verbal or written format. This inability makes it nearly impossible for them to compete effectively in the workplace, and stands in the way of career progression.

Being able to communicate effectively is therefore essential if you want to build a successful career. To do this, you must understand what your message is, what audience you are sending it to, and how it will be perceived. You must also weigh-in the circumstances surrounding your communications, such as situational and cultural context.

### Communications Skills – The Importance of Removing Barriers

Problems with communication can pop-up at every stage of the communication process (which consists of the **sender**, **encoding**, the **channel**, **decoding**, the **receiver**, **feedback** and the **context** – see the diagram below). At each stage, there is the potential for misunderstanding and confusion.

The Communications Process





To be an effective communicator and to get your point across without misunderstanding and confusion, your goal should be to lessen the frequency of problems at each stage of this process, with clear, concise, accurate, well-planned communications. We follow the process through below:

### **Source...**

As the source of the message, you need to be clear about why you're communicating, and what you want to communicate. You also need to be confident that the information you're communicating is useful and accurate.

### **Message...**

The message is the information that you want to communicate.

### **Encoding...**

This is the process of transferring the information you want to communicate into a form that can be sent and correctly decoded at the other end. Your success in encoding depends partly on your ability to convey information clearly and simply, but also on your ability to anticipate and eliminate sources of confusion (for example, cultural issues, mistaken assumptions, and missing information.)

A key part of this is knowing your audience: Failure to understand who you are communicating with will result in delivering messages that are misunderstood.

### **Channel...**

Messages are conveyed through channels, with verbal channels including face-to-face meetings, telephone and videoconferencing; and written channels including letters, emails, memos and reports.

Different channels have different strengths and weaknesses. For example, it's not particularly effective to give a long list of directions verbally, while you'll quickly cause problems if you give someone negative feedback using email.

### **Decoding...**

Just as successful encoding is a skill, so is successful decoding (involving, for example, taking the time to read a message carefully, or listen actively to it.) Just as confusion can arise from errors in encoding, it can also arise from decoding errors. This is particularly the case if the decoder doesn't have enough knowledge to understand the message.

### **Receiver...**

Your message is delivered to individual members of your audience. No doubt, you have in mind the actions or reactions you hope your message will get from this audience. Keep in mind, though, that each of these individuals enters into the communication process with ideas and feelings that will undoubtedly influence their understanding of your message, and their response. To be a successful communicator, you should consider these before delivering your message, and act appropriately.

**Feedback...**

Your audience will provide you with feedback, as verbal and nonverbal reactions to your communicated message. Pay close attention to this feedback, as it is the only thing that can give you confidence that your audience has understood your message. If you find that there has been a misunderstanding, at least you have the opportunity to send the message a second time.

**Context...**

The situation in which your message is delivered is the context. This may include the surrounding environment or broader culture (corporate culture, international cultures, and so on).

**Removing Barriers at All These Stages**

To deliver your messages effectively, you must commit to breaking down the barriers that exist within each of these stages of the communication process.

Let's begin with the message itself. If your message is too lengthy, disorganized, or contains errors, you can expect the message to be misunderstood and misinterpreted. Use of poor verbal and body language can also confuse the message.

Barriers in context tend to stem from senders offering too much information too fast. When in doubt here, less is oftentimes more. It is best to be mindful of the demands on other people's time, especially in today's ultra-busy society.

Once you understand this, you need to work to understand your audience's culture, making sure you can converse and deliver your message to people of different backgrounds and cultures within your own organization, in your country and even abroad.

## 9.1 Making a Great First Impression!

It takes just a quick glance, maybe three seconds, for someone to evaluate you when you meet for the first time. In this short time, the other person forms an opinion about you based on your appearance, your body language, your demeanor, your mannerisms, and how you are dressed.

With every new encounter, you are evaluated and yet another person's impression of you is formed. These first impression can be nearly impossible to reverse or undo, making those first encounters extremely important, for they set the tone for the all the relationships that follows.

So, whether they are in your career or social life, it's important to know how to create a good first impression. This article provides some useful tips to help you do this.

**Be on Time**

The person you are meeting for the first time is not interested in your 'good excuse' for running late. Plan to arrive a few minutes early. And allow flexibility for possible delays in traffic or taking a wrong turn. Arriving early is much better than arriving late, hands down, and is the first step in creating a great first impression.

**Be Yourself, Be at Ease**

If you are feeling uncomfortable and on edge, this can make the other person ill at ease and that's a sure way to create the wrong impression. If you are calm and confident, so the other person will

feel more at ease, and so have a solid foundation for making that first impression a good one. See our section on [relaxation techniques](#) to find out how to calm that adrenaline!

### **Present Yourself Appropriately**

Of course physical appearance matters. The person you are meeting for the first time does not know you and your appearance is usually the first clue he or she has to go on.

But it certainly does not mean you need to look like a model to create a strong and positive first impression. (Unless you are interviewing with your local model agency, of course!)

No. The key to a good impression is to present yourself appropriately.

They say a picture is worth a thousand words, and so the 'picture' you first present says much about you to the person you are meeting. Is your appearance saying the right things to help create the right first impression?

Start with the way you dress. What is the appropriate dress for the meeting or occasion? In a business setting, what is the appropriate business attire? Suit, blazer, casual? And ask yourself what the person you'll be meeting is likely to wear – if your contact is in advertising or the music industry, a pinstripe business suit may not strike the right note!

For business and social meetings, appropriate dress also varies between countries and cultures, so it's something that you should pay particular attention to when in an unfamiliar setting or country. Make sure you know the traditions and norms.

And what about your personal grooming? Clean and tidy appearance is appropriate for most business and social occasions. A good haircut or shave. Clean and tidy clothes. Neat and tidy make up. Make sure your grooming is appropriate and helps make you feel 'the part'.

Appropriate dressing and grooming help make a good first impression and also help you feel 'the part', and so feel more calm and confident. Add all of this up and you are well on your way to creating a good first impression.

### **A Word about Individuality**

The good news is you can usually create a good impression without total conformity or losing your individuality. Yes, to make a good first impression you do need to 'fit in' to some degree. But it all goes back to being appropriate for the situation. If in a business setting, wear appropriate business attire. If at a formal evening social event, wear appropriate evening attire. And express your individuality appropriately within that context.

### **A Winning Smile!**

'Smile and the world smiles too.\*' So there's nothing like a smile to create a good first impression. A warm and confident smile will put both you and the other person at ease. So smiling is a winner when it comes to great first impressions. But don't go overboard with this – people who take this too far can seem insincere and smarmy, or can be seen to be 'lightweights'.

*(\*Author Unknown)*

### **Be Open and Confident**

When it comes to making the first impression, body language as well as appearance speaks much louder than words.

Use your body language to project appropriate confidence and self-assurance. Stand tall, smile (of course), make eye contact, greet with a firm handshake. All of this will help you project confidence and encourage both you and the other person feel better at ease.

Almost everyone gets a little nervous when meeting someone for the first time, which can lead to nervous habits or sweaty palms. By being aware of your nervous habits, you can try to keep them in check. And controlling a nervous jitter or a nervous laugh will give you confidence and help the other person feel at ease. Again, see our section on [relaxation techniques](#) for help with this.

### **Small Talk Goes a Long Way...**

Conversations are based on verbal give and take. It may help you to prepare questions you have for the person you are meeting for the first time beforehand. Or, take a few minutes to learn something about the person you meet for the first time before you get together. For instance, does he play golf? Does she work with a local charitable foundation?

Is there anything that you know of that you have in common with the person you are meeting? If so, this can be a great way to open the conversation and to keep it flowing.

### **Be Positive**

Your attitude shows through in everything you do. Project a positive attitude, even in the face of criticism or in the case of nervousness. Strive to learn from your meeting and to contribute appropriately, maintaining an upbeat manner and a smile.

### **Be Courteous and Attentive**

It goes without saying that good manners and polite, attentive and courteous behavior help make a good first impression. In fact, anything less can ruin the one chance you have at making that first impression. So be on your best behavior!

One modern manner worth mentioning is 'turn off your mobile phone'. What first impression will you create if you are already speaking to someone other than the person you are meeting for the first time? Your new acquaintance deserves 100% of your attention. Anything less and you'll create a less than good first impression.

### **Key Points**

You have just a few seconds to make a good first impression and it's almost impossible ever to change it. So it's worth giving each new encounter your best shot. Much of what you need to do to make a good impression is common sense. But with a little extra thought and preparation, you can hone your intuitive style and make every first impression not just good but great.

## **9.2 The Johari Window**

### **Creating better understanding between individuals and groups**

The Johari Window is a communication model that can be used to improve understanding between individuals within a team or in a group setting. Based on disclosure, self-disclosure and feedback, the Johari Window can also be used to improve a group's relationship with other groups

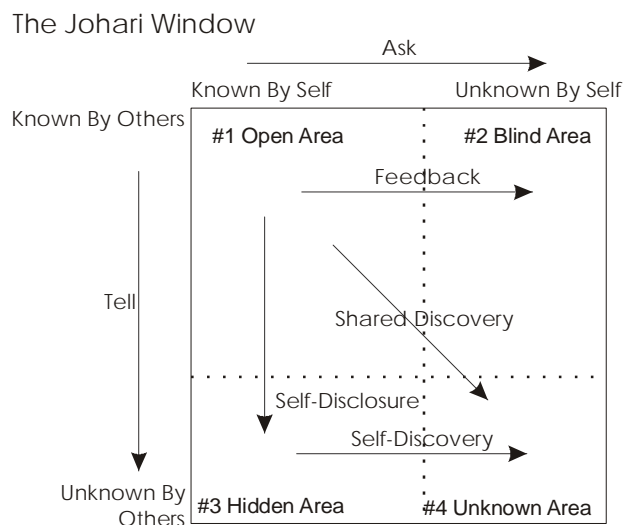
Developed by **Joseph Luft** and **Harry Ingham** (the word 'Johari' comes from Joseph Luft and Harry Ingham), there are two key ideas behind the tool:

1. That individuals can build trust between themselves by disclosing information about themselves; and
2. That they can learn about themselves and come to terms with personal issues with the help of feedback from others.

By explaining the idea of the Johari Window to your team, you can help team members understand the value of self-disclosure, and gently encourage people to give and accept feedback. Done sensitively, this can help people build more-trusting relationships with one another, solve issues and work more effectively as a team.

### Explaining the Johari Window:

The Johari Window model consists of a foursquare grid (think of taking a piece of paper and dividing it into four parts by drawing one line down the middle of the paper from top to bottom, and another line through the middle of the paper from side-to-side). This is shown in the diagram below:



Using the Johari model, each person is represented by their own four-quadrant, or four-pane, window. Each of these contains and represents personal information – feelings, motivation – about the person, and shows whether the information is known or not known by themselves or other people.

The four quadrants are:

#### **Quadrant 1: Open Area**

What is known by the person about him/herself and is also known by others.

#### **Quadrant 2: Blind Area, or 'Blind Spot'**

What is unknown by the person about him/herself but which others know. This can be simple information, or can involve deep issues (for example, feelings of inadequacy, incompetence, unworthiness, rejection) which are difficult for individuals to face directly, and yet can be seen by others.

#### **Quadrant 3: Hidden or Avoided Area**

What the person knows about him/herself that others do not.

**Quadrant 4: Unknown Area**

What is unknown by the person about him/herself and is also unknown by others.

The process of enlarging the open quadrant vertically is called self-disclosure, a give and take process between the person and the people he/she interacts with.

As information is shared, the boundary with the hidden quadrant moves downwards. And as other people reciprocate, trust tends to build between them.

**Tip 1:**

Don't be rash in your self-disclosure. Disclosing harmless items builds trust. However, disclosing information which could damage people's respect for you can put you in a position of weakness.

**Using the Tool:**

The process of enlarging the open quadrant horizontally is one of [feedback](#). Here the individual learns things about him- or her-self that others can see, but he or she can't.

**Tip 2:**

Be careful in the way you give feedback. Some cultures have a very open and accepting approach to feedback. Others don't. You can cause incredible offence if you offer personal feedback to someone who's not used to it. Be sensitive, and start gradually.

If anyone is interested in learning more about this individual, they reciprocate by disclosing information in their hidden quadrant.

For example, the first participant may disclose that he/she is a runner. The other participant may respond by adding that he/she works out regularly at the local gym, and may then disclose that the gym has recently added an indoor jogging track for winter runners.

As your levels of confidence and self-esteem rises, it is easier to invite others to comment on your blind spots. Obviously, [active](#) and [empathic listening](#) skills are useful in this exercise.

**The Johari Window in a Team Context**

Keep in mind that established team members will have larger open areas than new team members. New team members start with smaller open areas because little knowledge about the new team member has yet been shared. The size of the Open Area can be expanded horizontally into the blind space, by seeking and actively listening to feedback from other group members.

Group members should strive to assist a team member in expanding their Open Area by offering constructive feedback. The size of the Open Area can also be expanded vertically downwards into the hidden or avoided space by the sender's disclosure of information, feelings, etc about himself/herself to the group and group members.

Also, group members can help a person expand their Open Area into the hidden area by asking the sender about himself/herself. Managers and team leaders play a key role here, facilitating feedback and disclosure among group members, and by providing constructive feedback to individuals about their own blind areas.

**Key Points**

In most cases, the aim in groups should be to develop the Open Area for every person.

Working in this area with others usually allows for enhanced individual and team effectiveness and productivity. The Open Area is the 'space' where good communications and cooperation occur, free from confusion, conflict and misunderstanding.

Self-disclosure is the process by which people expand the Open Area vertically. Feedback is the process by which people expand this area horizontally.

By encouraging healthy self-disclosure and sensitive feedback, you can build a stronger and more effective team.

## 9.3 Business Story-Telling

### Using stories to inspire

Think about this for a minute, because it may happen more often than you think. How many times have you stayed up late reading a novel that you 'couldn't' put down, or watching a movie that you couldn't turn off? How many times have you pushed yourself harder after hearing the story of someone else's success, or changed your opinion after reading a convincing article in a magazine or newspaper?

There's no doubt that stories can change the way we think, act, and feel. Leaders, especially, can use the power of a good story to influence and motivate their teams to new heights. Stories can inspire everything from understanding to action. They can create legends that an entire workplace culture can build upon, and they have the power to break down barriers and turn a bad situation into a good one. Stories can capture our imaginations and make things real in a way that cold, hard facts can't.

Make no mistake – stories can be very, very powerful leadership tools. Great leaders know this, and many top CEOs today use stories to illustrate points and sell their ideas.

So, do you want to be a persuasive motivator? If so, learn how to tell a good story. But how? When should you tell a story, and how do you know what kind of story to tell to get the results you want? This article summarizes our Expert Interview with [Annette Simmons](#), author of '[Whoever Tells the Best Story Wins.](#)'

### Types of Stories

Learn what kind of story to tell for different situations. There are six main types of story that you can use in the workplace:

**1. 'Who I Am' Stories** – When you start leading a team, members of your new team sometimes make automatic judgments about who you are. They may see you as controlling, mean, or 'out to get them' without really knowing you. If you tell a 'Who I Am' story when you first become a team leader, you can give a powerful insight into what really motivates you. This can break down walls and help your team realize that you're a person just like them.

Your goal with a 'Who I Am' story should be to reveal some type of flaw about yourself or mistake that you've made. Why? Because by revealing a flaw, you show your team that you trust them with this information. Revealing flaws can also make you more approachable, because it demonstrates that you're only human. (Just make sure it's a small flaw!)

For example, the author often finds that when clients first meet her, they assume that her primary goal is to sell them copies of her book or more consulting time. She gets past this by explaining that her dad was a social worker who wanted her to help others (while also being her own boss) and so felt she should go to law school. She was so determined not to do this, that she moved to



Australia. This story has the double benefit of emphasizing that she didn't grow up in privileged circumstances, and so actually has a background similar to that of many of her clients, and also that she might sometimes make slightly foolish decisions. After all, emigrating to another continent is a rather extreme way of getting out of going to law school!

**2. 'Why I'm Here' Stories** – These are very similar to 'Who I Am' stories. The goal is to replace suspicion with trust, and help your team realize that you don't have any hidden agendas. Show that you're a good person, and that you want to work together with them to achieve a common goal.

For example, a new member of the school board was appointed to the sub-committee responsible for the head teacher's performance management. In their first meeting, which looked at whether the head had met her stated objectives in the past year, the new member challenged the Head on several aspects of the proof presented. After the meeting, the new board member approached the Head, and explained 'I'm sure you realize that my challenges are not personal. And I think you're doing great work. However, my duty as a board member is to ensure that the city's education budget is being spent wisely, and so it's my job to ensure that bonuses are only paid when there's a real justification for doing so.' The Head reassured her that she understood this perfectly, and was, in fact, grateful for the rigor she had brought to the process.

**3. Teaching Stories** – It can be very hard to teach without demonstrating, and that's the whole purpose of Teaching Stories.

There's no better example of this than Aesop's fables. Remember 'The Boy Who Cried Wolf'? This story alone has taught millions of children not to yell for help unless there's a real need for it. Although it's simple, like most fables, it's done an effective job for centuries.

Use Teaching Stories to make a lesson clear and to help people remember why they're doing something in the first place.

The author tells a more recent example to emphasize the value of teaching stories. She was working with a nation wide chain of care homes for the elderly. Many of the staff in these homes are young and, with the best intentions, often use tones of voice that are more suitable for addressing young children than elderly people. The challenge was to get these young staff to remember to use respectful tones of voice. She achieved this by telling the story of her own grandmother, who suffered a stroke and was unable to speak. After some months, she gave up eating because she had decided she would rather die than live without dignity, because of the patronizing way in which her carers spoke to her.

**4. Vision Stories** – Tell these to inspire hope, especially when your team needs occasional reminders of why they're doing what they should be doing.

Vision Stories are meant to stimulate action and raise morale. Find a story that reminds everyone what the ultimate goal is, and why it's important that everyone reaches that goal. This type of story should be told from your heart, with emotion.

The author shares her own vision story, which is one of human beings saving the planet from ecological disaster by working together. She drew on the importance of embedding this collaborative approach in society when she was at the airport recently, and her plane was delayed for the third time. While it would have been tempting to take out her frustration on the airline staff, remembering the importance of helping others to work collaboratively helped her calm her emotions.

**5. 'Values in Action' Stories** – When you see the word 'integrity,' what do you think of? Honesty? Doing the right thing for the right reason?

Every value can mean something different from person to person. If you want to pass on values to your team, start by defining what those values mean to you. So, if you want your team to demonstrate a high level of customer service, then tell a story that reveals exactly what customer service means to you.

For example, a chain of opticians ran an advertising campaign that offered to replace glasses with a new style if customers didn't like the frames when they got them home. Now this led to the transaction costing the optician money in most cases. However, the manager at one store regularly told his staff about a customer who had taken advantage – most apologetically – of the offer, but then not only remained loyal to that optical chain for years, but also recommended the chain to her family and friends. As a result, the small loss on one transaction bought the chain many profitable purchases in the future.

**6. 'I Know What You're Thinking' Stories** – The world of business involves frequent bargaining. The advantage of telling this type of story is that you can recognize another person's objections, and then show why those objections aren't applicable in this situation. You can show respect for the other point of view while convincing the person that you're right.

For example, a saleswoman in children's shoe store convinces a mom to buy a pair of premium-priced shoes by explaining that if her child doesn't find his new shoes comfortable after a week, she can bring them back for an exchange or refund. This is the case even though the shoes would be worn and couldn't be resold. The saleswoman backs this up by telling of one customer who did that just last week, although she was the only customer whose child hadn't loved the shoes.

### Tips

Keep these suggestions in mind when telling your stories:

- **Be authentic** – The best storytellers talk from their hearts, so don't try to fake an emotion that you don't feel. Your listeners will probably see through this, and your story will crash and burn.
- **Pay attention to your audience** – Stories that are too long are generally boring. Tell the story well, but don't go on forever.
- **Practice** – Try to practice before you tell the story. Even if you tell it to yourself just once in front of a mirror or video camera, this can help you when you're in front of your real audience.
- **Create an experience** – Remember that when you tell a story, you're creating an experience for your listeners. Don't just use sound (words), but the other senses as well. **Show** your listeners the picture you're painting, don't just **tell** them.

For example, it's easy to tell people that it's snowing outside. But if you want your listeners to really experience the snow, then describe how cold it is and the way the wind blows snow into your eyes. Tell them how you dream of a hot cup of cocoa after you're done shoveling snow in your driveway, and how your toes freeze because your boots aren't warm enough. Try to engage the five senses in every story: taste, touch, sight, hearing, and smell. They'll make your story come alive.

### Key Points

Stories can be powerful leadership tools – if they're told well.

Know which kind of story to tell, and spend time brainstorming some good ideas for each type of situation. Remember, you're creating an experience for your listeners, so focus on using at least

two or three senses when you tell your story. Create interest, and draw your listeners in. Show them what you're saying, don't just tell them.

## 9.4 Better Public Speaking and Presentation

### Ensure your words are always understood

Think of the last really memorable talk or presentation that you attended. Now, was that easy to do, or did you really have to rack your brains to remember one? Sadly, too many presentations are easy to forget. And that's a big problem because the only reason the presenter gave the talk was to communicate something to you!

However, there are three basic things that you can do to ensure that your verbal messages are understood – and remembered – time and time again.

Although somewhat obvious and deceptively simple, these are:

- Understand the purpose of the presentation
- Keep the message clear and concise
- Be prepared
- Be vivid when delivering the message

#### Understand What You Want to Achieve

Before you start working on your talk or presentation, it's vital that you really understand what you want to say, who you want to tell and why they might want to hear it. To do this, ask yourself: **Who? What? How? When? Where? Why?**

**Who** are you speaking to? What are their interests, presuppositions and values? What do they share in common with others; how are they unique?

**What** do you wish to communicate? One way of answering this question is to ask yourself about the 'success criteria'. How do you know if and when you have successfully communicated what you have in mind?

**How** can you best convey your message? Language is important here, as are the nonverbal cues discussed earlier. Choose your words and your nonverbal cues with your audience in mind. Plan a beginning, middle and end. If time and place allow, consider and prepare audio-visual aids.

**When?** Timing is important here. Develop a sense of timing, so that your contributions are seen and heard as relevant to the issue or matter at hand. There is a time to speak and a time to be silent. 'It's better to be silent than sing a bad tune.'

**Where?** What is the physical context of the communication in mind? You may have time to visit the room, for example, and rearrange the furniture. Check for availability and visibility if you are using audio or visual aids.

**Why?** In order to convert hearers into listeners, you need to know why they should listen to you – and tell them if necessary. What disposes them to listen? That implies that you know yourself why you are seeking to communicate – the value or worth or interest of what you are going to say.

## Keep It Simple

When it comes to wording your message, less is more. You're giving your audience headlines. They don't need to and are usually not expecting to become experts on the subject as a result of hearing your talk.

If you're using slides, limit the content of each one to a few bullet points, or one statement or a very simple diagram

## Be Prepared

Preparation is underrated. In fact, it is one of the most important factors in determining your communication successes. When possible, set meeting times and speaking and presentation times well in advance, thus allowing yourself the time you need to prepare your communications, mindful of the entire communication process ([source, encoding, channel, decoding, receiver, feedback and context](#)). By paying close attention to each of these stages and preparing accordingly, you ensure your communications will be more effective and better understood.

Of course, not all communications can be scheduled. In this case, preparation may mean having a good, thorough understanding of the office goings-on, enabling you to communicate with the knowledge you need to be effective, both through verbal and written communications.

## Unforgettable Delivery

Your delivery of your speech or presentation will make or break it, no matter how well you've prepared and crafted your clear, concise message. Some useful tips for keeping your presentation vivid include:

- Use examples to bring your points to life
- Keep your body language up-beat – don't stay stuck behind a rostrum
- Don't talk to fast. Less is more here too. Pauses are effective.
- Use a variety of tones of voice
- Use visual aids.

## 9.5 Speaking to an Audience

### Communicate complex ideas successfully

Speaking to an audience can be fun and exciting. However, lack of preparation or not clearly defining the presentation's goals and its audience can make even the best-intended presentation a complete disaster.

### Preparation – The Key to Successful Speaking...

To ensure your presentation is effective, first determine your objective. Ask yourself:

- Why am I giving the presentation?
- What do I want the audience to take away from the presentation?

Second, determine your audience. Their familiarity with the presentation topic will determine the level at which you present your speech.

## How to Structure Your Presentation

Once you have determined your presentation's objective and overall goal, as well as the audience, it's time to structure your presentation. You will need to start this process by determining the length of the presentation.

Take the allotted time and break it into smaller segments, with each segment tackling a specific task (all of which reflect the overall objective of the presentation). For example, the first segment should be the presentation introduction. In this segment, you should give an overview of your presentation, or a short summary of your speech, explaining the topic, why you are covering this topic, and what you hope to accomplish.

The next segment should tackle the first item on your agenda, with the following segment tackling the following item on your agenda, and so on.

Once you have developed the introduction and outlined the following segments, spend some time thinking about the conclusion of the presentation. The introduction of the presentation and the conclusion of the presentation are the most important parts and should have the strongest impact.

## Achieving Clarity and Impact

Keep your presentation short and simple. Your audience will not remember every point of your presentation, so highlight the most important parts. The longer the presentation, the higher the risk of boredom.

When in doubt, use the 'tell 'em' structure:

- Tell them what you are going to tell them (For instance, 'In this presentation I will show you...').
- Tell them the key points, expanding and illustrating each one, clearly and concisely.
- Tell them what you have told them (For instance, 'In closing...' or 'In summary...') and conclude.

## Reinforce Your Message with Visual Aids

Next, consider the use of visual aids. Slide projectors, data projectors, video machines and computers should be tested out beforehand to make sure they are operating correctly and that you know how to use them.

Make sure you do not cram too much information onto any single visual. A good rule of thumb to follow is to keep each visual to six lines or less. Also, make sure any type or graphics are large enough the audience can see it clearly (from all seats) and make sure the colors used are easy on the eyes, taking into account the lighting.

A sad fact is that much of your authority will be judged by the quality of your slides – you need to make sure that their design supports the style of your message.

Overheads should be clearly marked and arranged in order beforehand. Flip charts should be prepared in advance when possible. When used during the presentation to take notes, make print large enough for all participants to see.

When using these various visuals, do not turn your back to the audience. Position yourself so you can use the visuals while facing your audience.

## Arranging the Room

If possible, visit the room in which you will make the presentation well in advance. Determine seating (circle seating encourages interaction, rows of seats discourages interaction, etc.) and determine how the visual aids you choose will work. Consider lighting, space, even the temperature of the room. Consider placing notepads and pencils at each seat if participants need to take notes. Or, you may want to have glasses at each seat with a few pitchers of water if the presentation is going to last more than half of an hour. If you do this, make sure you allow time for bathroom breaks.

While you do not need to memorize your entire presentation, make yourself very, very familiar with it through several practice runs. Rehearse the presentation in its entirety as often as you can before delivering it to a live audience. The more you rehearse, the more confident you will be and the more fluent you will seem to your audience – if you know your subject matter and have adequately prepared, you will be able to deliver your message loud and clear.

When in doubt or nervous, stay focused on your purpose – helping your audience understand your message. Direct your thoughts to the subject at hand. The audience has come to hear your presentation and you will succeed!

## Tips and Techniques

Tips to help make your presentation a smashing success:

- Avoid too many statistics and confusing information in your presentation. Instead, put this information in a handout for participants to refer to at a later date.
- If you forget your words, pause for a moment and remember your objective. While the words may not come right back to you, this will help keep you on track and may even help you to think of additional thoughts and ideas your audience will benefit from hearing.
- Visualize yourself succeeding.
- Begin by breathing.
- Before the presentation, focus on the needs of the audience.
- Take a public speaking course at a local college or university. These are oftentimes offered as night courses and are usually very inexpensive, while providing you with important skills that will enhance your confidence in this area.
- Videotape yourself going through the presentation. All you need to do this is a video camera and a tripod. Then, run through the video and make changes according to your thoughts on the taped presentation.

## 9.6 Presentation Planning Checklist

This presentation checklist will help you deliver successful presentation. This is adapted in part from [Business Communications: A Cultural and Strategic Approach](#) by Michael J. Rouse and Sandra Rouse.

**Presentation:**

- Does your introduction grab participant's attention and explain your objectives?
- Do you follow this by clearly defining the points of the presentation?
- Are these main points in logical sequence?
- Do these flow well?
- Do the main points need support from visual aids?
- Does your closing summarize the presentation clearly and concisely?
- Is the conclusion strong?
- Have you tied the conclusion to the introduction?

**Delivery:**

- Are you knowledgeable about the topic covered in your presentation?
- Do you have your notes in order?
- Where and how will you present (indoors, outdoors, standing, sitting, etc.)?
- Have you visited the presentation site?
- Have you checked your visual aids to ensure they are working and you know how to use them?

**Appearance:**

- Make sure you are dressed and groomed appropriately and in keeping with the audience's expectations.
- Practice your speech standing (or sitting, if applicable), paying close attention to your body language, even your posture, both of which will be assessed by the audience.

**Visual Aids:**

- Are the visual aids easy to read and easy to understand?
- Are they tied into the points you are trying to communicate?
- Can they be easily seen from all areas of the room?

## 9.7 Questioning Techniques

### Asking questions effectively

Garbage in, garbage out, is a popular truth, often said in relation to computer systems: If you put the wrong information in, you'll get the wrong information out. The same principle applies to communications in general: If you ask the wrong questions, you'll probably get the wrong answer, or at least not quite what you're hoping for.

Asking the right question is at the heart of effective communications and information exchange. By using the right questions in a particular situation, you can improve a whole range of communications skills: for example, you can gather better information and learn more; you can build stronger relationships, manage people more effectively and help others to learn too.

So here are some common questioning techniques, and when (and when not) to use them:



## Open and Closed Questions

A closed question usually receives a single word or very short, factual answer. For example, 'Are you thirsty?' The answer is 'Yes' or 'No'; 'Where do you live?' The answer is generally the name of your town or your address.

Open questions elicit longer answers. They usually begin with what, why, how. An open question asks the respondent for his or her knowledge, opinion or feelings. 'Tell me' and 'describe' can also be used in the same way as open questions. Here are some examples:

- What happened at the meeting?
- Why did he react that way?
- How was the party?
- Tell me what happened next.
- Describe the circumstances in more detail.

### Open questions are good for:

- Developing an open conversation: 'What did you get up to on vacation?'
- Finding out more detail: 'What else do we need to do to make this a success?'
- Finding out the other person's opinion or issues: 'What do you think about those changes?'

### Closed questions are good for:

- Testing your understanding, or the other person's: 'So, if I get this qualification, I will get a rise?'
- Concluding a discussion or making a decision: 'Now we know the facts, are we all agreed this is the right course of action?'
- Frame setting: 'Are you happy with the service from your bank?'

A misplaced closed question, on the other hand, can kill the conversation and lead to awkward silences, so are best avoided when a conversation is in full flow.

## Funnel Questions

This technique involves starting with general questions, and then homing in on a point in each answer, and asking more and more detail at each level. It's often used by detectives taking a statement from a witness:

'How many people were involved in the fight?'

*'About ten.'*

'Were they kids or adults?'

*'Mostly kids.'*

'What sort of ages were they?'

*'About fourteen or fifteen.'*

'Were any of them wearing anything distinctive?'

*'Yes, several of them had red baseball caps on.'*

'Can you remember if there was a logo on any of the caps?'

*'Now you come to mention it, yes, I remember seeing a big letter N.'*

Using this technique, the detective has helped the witness re-live the scene and gradually focus on a useful detail. Perhaps he'll be able to identify young men wearing a hat like this from CCTV

footage. It is unlikely he would have got this information if he's simply asked an open question such as 'Are there any details you can give me about what you saw?'

**Tip:**

When using funnel questioning, start with closed questions. As you progress through the tunnel, start using more open questions.

**Funnel questions are good for:**

- Finding out more detail about a specific point: 'Tell me more about Option 2.'
- Gaining the interest or increasing the confidence of the person you're speaking with: 'Have you used the IT Helpdesk?', 'Did they solve your problem?', 'What was the attitude of the person who took your call?'

**Probing Questions**

Asking probing questions is another strategy for finding out more detail. Sometimes it's as simple as asking your respondent for an example, to help you understand a statement they have made. At other times, you need additional information for clarification, 'When do you need this report by, and do you want to see a draft before I give you my final version?', or to investigate whether there is proof for what has been said, 'How do you know that the new database can't be used by the sales force?'

An effective way of probing is to use the [5 Whys](#) method, which can help you quickly get to the root of a problem.

**Tip:**

Use questions that include the word 'exactly' to probe further: 'What exactly do you mean by fast-track?', 'Who, exactly, wanted this report?'

**Probing questions are good for:**

- Gaining clarification to ensure you have the whole story and that you understand it thoroughly.
- Drawing information out of people who are trying to avoid telling you something.

**Leading Questions**

Leading questions try to lead the respondent to your way of thinking. They can do this in several ways:

- With an assumption: 'How late do you think that the project will deliver?'. This assumes that the project will certainly not be completed on time.
- By adding a personal appeal to agree at the end: 'Lori's very efficient, don't you think?' or 'Option 2 is better, isn't it?'
- Phrasing the question so that the 'easiest' response is 'yes' (our natural tendency to prefer to say 'yes' than 'no' plays an important part in the phrasing of referendum questions): 'Shall we all approve Option 2?' is more likely to get a positive response than 'Do you want to approve option 2 or not?'. A good way of doing this is to make it personal. For example, 'Would you like me to go ahead with Option 2?' rather than 'Shall I choose Option 2?'
- Giving people a choice between two options, both of which you would be happy with, rather than the choice of one option or not doing anything at all. Strictly speaking, the choice of

'neither' is still available when you ask 'Which would you prefer of A or B', but most people will be caught up in deciding between your two preferences.

Note that leading questions tend to be closed.

### Leading questions are good for:

- Getting the answer you want but leaving the other person feeling that they have had a choice.
- Closing a sale: 'If that answers all of your questions, shall we agree a price?'

#### Tip:

Use leading questions with care. If you use them in a self-serving way or one that harms the interests of the other person, then they can, quite rightly, be seen as manipulative and dishonest.

### Rhetorical Questions

Rhetorical questions aren't really questions at all, in that they don't expect an answer. They're really just statements phrased in question form: 'Isn't John's design work so creative?'

People use rhetorical questions because they are engaging for the listener – as they are drawn into agreeing ('Yes it is and I like working with such a creative colleague') – rather than feeling that they are being 'told' something like 'John is a very creative designer'. (To which they may answer

#### Tip:

Rhetorical questions are even more powerful if you use a string of them. 'Isn't that a great display? Don't you love the way the text picks up the colors in the photographs? Doesn't it use space really well? Wouldn't you love to have a display like that for our products?'

'So What?')

### Rhetorical questions are good for:

- Engaging the listener.

### Using Questioning Techniques

You have probably used all of these questioning techniques before in your everyday life, at work and at home. But by consciously applying the appropriate kind of questioning, you can gain the information, response or outcome that you want even more effectively.

Questions are a powerful way of:

- **Learning:** Ask open and closed questions, and use probing questioning.
- **Relationship building:** People generally respond positively if you ask about what they do or enquire about their opinions. If you do this in an affirmative way 'Tell me what you like best about working here', you will help to build and maintain an open dialogue.
- **Managing and coaching:** Here, rhetorical and leading questions are useful too. They can help get people to reflect and to commit to courses of action that you've suggested: 'Wouldn't it be great to gain some further qualifications?'

- **Avoiding misunderstandings:** Use probing questions to seek clarification, particularly when the consequences are significant. And to make sure you avoid jumping to conclusions, the [Ladder of Inference](#) tool can help too.
- **Diffusing a heated situation:** You can calm an angry customer or colleague by using funnel questions to get them to go into more detail about their grievance. This will not only distract them from their emotions, but will often help you to identify a small practical thing that you can do, which is often enough to make them feel that they have 'won' something, and no longer need to be angry.
- **Persuading people:** No one likes to be lectured, but asking a series of open questions will help others to embrace the reasons behind your point of view. 'What do you think about bringing the sales force in for half a day to have their laptops upgraded?'

**More Tips:**

Make sure that you give the person you're questioning enough time to respond. This may need to include thinking time before they answer, so don't just interpret a pause as a 'No comment' and plow on.

Skilful questioning needs to be matched by careful [listening](#) so that you understand what people really mean with their answers.

Your body language and tone of voice can also play a part in the answers you get when you ask questions.

## 9.8 Active Listening

### Hear what people are really saying

Listening is one of the most important skills you can have. How well you listen has a major impact on your job effectiveness, and on the quality of your relationships with others.

We listen to obtain information.

We listen to understand.

We listen for enjoyment.

We listen to learn.

Given all this listening we do, you would think we'd be good at it! In fact we're not. Depending on the study being quoted, we remember a dismal 25-50% of what we hear. That means that when you talk to your boss, colleagues, customers or spouse for 10 minutes, they only really hear 2½-5 minutes of the conversation.

Turn it around and it reveals that when you are receiving directions or being presented with information, you aren't hearing the whole message either. You hope the important parts are captured in your 25- 50%, but what if they're not?

Clearly, listening is a skill that we can all benefit from improving. By becoming a better listener, you will improve your productivity, as well as your ability to influence, persuade negotiate. What's more, you'll avoid conflict and misunderstandings – all necessary for workplace success. )

Good communication skills require a high level of self-awareness. By understanding your personal style of communicating, you will go a long way towards creating good and lasting impressions with others.

The way to become a better listener is to practice 'active listening'. This is where you make a conscious effort to hear not only the words that another person is saying but, more importantly, to try and understand the total message being sent.

In order to do this you must pay attention to the other person very carefully.

You cannot allow yourself to become distracted by what else may be going on around you, or by forming counter arguments that you'll make when the other person stops speaking. Nor can you allow yourself to lose focus on what the other person is saying. All of these barriers contribute to a lack of listening and understanding.

**Tip:**

If you're finding it particularly difficult to concentrate on what someone is saying, try repeating their words mentally as they say it – this will reinforce their message and help you control mind drift.

To enhance your listening skills, you need to let the other person know that you are listening to what he or she is saying. To understand the importance of this, ask yourself if you've ever been engaged in a conversation when you wondered if the other person was listening to what you were saying. You wonder if your message is getting across, or if it's even worthwhile to continue speaking. It feels like talking to a brick wall and it's something you want to avoid.

Acknowledgement can be something as simple as a nod of the head or a simple 'uh huh.' You aren't necessarily agreeing with the person, you are simply indicating that you are listening. Using body language and other signs to acknowledge you are listening also reminds you to pay attention and not let your mind wander.

You should also try to respond to the speaker in a way that will both encourage him or her to continue speaking, so that you can get the information if you need. While nodding and 'uh huhing' says you're interested, an occasional question or comment to recap what has been said communicates that you understand the message as well.

### Becoming an Active Listener

There are five key elements of active listening. They all help you ensure that you hear the other person, and that the other person knows you are hearing what they are saying.

#### 1. Pay attention.

Give the speaker your undivided attention and acknowledge the message. Recognize that what is not said also speaks loudly.

- Look at the speaker directly.
- Put aside distracting thoughts. Don't mentally prepare a rebuttal!
- Avoid being distracted by environmental factors.
- 'Listen' to the speaker's body language.
- Refrain from side conversations when listening in a group setting.

#### 2. Show that you are listening.

- Use your own body language and gestures to convey your attention.
- Nod occasionally.
- Smile and use other facial expressions.

- Note your posture and make sure it is open and inviting.
- Encourage the speaker to continue with small verbal comments like yes, and uh huh.

### 3. Provide feedback.

Our personal filters, assumptions, judgments, and beliefs can distort what we hear. As a listener, your role is to understand what is being said. This may require you to reflect what is being said and ask questions.

- Reflect what has been said by paraphrasing. 'What I'm hearing is...' and 'Sounds like you are saying...' are great ways to reflect back.
- Ask questions to clarify certain points. 'What do you mean when you say...' 'Is this what you mean?'
- Summarize the speaker's comments periodically.

**Tip:**

If you find yourself responding emotionally to what someone said, say so, and ask for more information: 'I may not be understanding you correctly, and I find myself taking what you said personally. What I thought you just said is XXX; is that what you meant?'

### 4. Defer judgment.

Interrupting is a waste of time. It frustrates the speaker and limits full understanding of the message.

- Allow the speaker to finish.
- Don't interrupt with counterarguments.

### 5. Respond Appropriately.

Active listening is a model for respect and understanding. You are gaining information and perspective. You add nothing by attacking the speaker or otherwise putting him or her down.

- Be candid, open, and honest in your response.
- Assert your opinions respectfully.
- Treat the other person as he or she would want to be treated.

## Key Points

It takes a lot of concentration and determination to be an active listener. Old habits are hard to break, and if your listening habits are as bad as many people's are, then there's a lot of habit-breaking to do!

Be deliberate with your listening and remind yourself constantly that your goal is to truly hear what the other person is saying. Set aside all other thoughts and behaviors and concentrate on the message. Ask question, reflect, and paraphrase to ensure you understand the message. If you don't, then you'll find that what someone says to you and what you hear can be amazingly different!

Start using active listening today to become a better communicator and improve your workplace productivity and relationships.

## 9.9 Effective Email

### How to communicate powerfully by email

When you're trying to locate some information in an e-mail someone sent you a few weeks back, what helps you find it quickly? If the sender included the information you want in a long message covering lots of points, the chances are that it will take you time to find it. Worse, if the sender is someone you communicate with regularly, and he or she just pressed Reply to a previous message about a different point, the heading of the mail you need won't actually be related to the information you want.

There are a few simple rules to ensure that your emails are read in the first place and stay useful to the recipient.

#### **Subject Lines are Headlines**

The headline in a newspaper does two things: It grabs your attention and informs you what the article is about so you can decide whether you want to read further. Email subject lines need to do the same thing. Use the subject line to inform the receiver of EXACTLY what the email is about in a few well-chosen words. You might include a call to action such as 'Please respond by 7 November', and if your message is one of a regular series of mails, such as a weekly project report, include the date in the subject line too.

Because everyone gets emails they do not want (spam), appropriate use of the subject line increases the chances your email will be read and not deleted without so much as a glance.

Of course, just as it would be ridiculous to publish a newspaper without headlines, never leave the subject line blank.

#### **Make One Point per Email**

The beauty of email, compared with letters, is that it doesn't cost any more to send several mails than it does to send one. So, if you need to communicate with someone about several matters, write a separate email on each subject. That way your correspondent can reply to each one in the appropriate time-frame. One topic might only require a short reply that he or she can make straight away. Another topic might require more research. By writing separate emails, you get clearer answers.

However, as with traditional business letters, the email should be clear and concise, with the purpose of the email detailed in the very first paragraph. Sentences should be kept short and to the point.

The body of the email should contain all pertinent information (see our articles on [Writing Skills](#) and on [The Rhetorical Triangle](#)) and should be direct and informative.

#### **Specify the Response You Want**

Make sure to include any call to action you desire, such as a phone call or follow-up appointment. Then, make sure you include your contact information, including your name, title, and phone numbers. Do this even with internal messages: The easier you make it for someone else to respond, the more likely they are to do so.



### **Be a Good Correspondent**

If you regularly correspond using email, make sure to clean out your email inbox at least once each day. This is a simple act of courtesy and will also serve to encourage senders to return your emails in a timely manner.

If a lengthy response is required to an email, but you don't have the time to pull together the information required now, send a holding reply saying that you have received the message, and indicating when you will respond fully.

Always set your Out of Office agent when you are going to be away from your email for a day or more, whether on leave or because you're at meetings.

### **Internal Email**

Internal email should be checked regularly throughout the working day and returned in a much quicker manner as it often involves timely projects, immediate updates, meeting notes, and so on. Nonetheless, internal emails, just like other emails, should not be informal. Remember, these are written forms of communication that can be printed out and viewed by others than those originally intended for. Always use your spell checker, and avoid slang.

## **9.10 Writing Skills**

### **Getting your written message across clearly**

A colleague has just sent you an email relating to a meeting you're having in one hour's time. The email is supposed to contain key information that you need to present, as part of the business case for an important project.

But there's a problem: The email is so badly written that you can't find the data you need. There are misspellings and incomplete sentences, and the paragraphs are so long and confusing that it takes you three times more than it should to find the information you want.

As a result, you're under-prepared for the meeting, and it doesn't go as well as you want it to.

Have you ever faced a situation similar to this? In today's information overload world, it's vital to communicate clearly, concisely and effectively. People don't have time to read book-length emails, and they don't have the patience to scour badly-constructed emails for "buried" points.

The better your writing skills are, the better the impression you'll make on the people around you – including your boss, your colleagues, and your clients. You never know how far these good impressions will take you!

In this article, we'll look at how you can improve your writing skills and avoid common mistakes.

### **Audience and Format**

The first step to writing clearly is choosing the appropriate format. Do you need to send an informal [email](#)? Write a detailed [report](#)? Create advertising copy? Or write a formal letter?

The format, as well as your audience, will define your "writing voice" – that is, how formal or relaxed the tone should be. For instance, if you write an email to a prospective client, should it have the same tone as an email to a friend?

Definitely not.

Start by identifying who will read your message. Is it targeted at senior managers, the entire human resources team, or a small group of engineers? With everything you write, your readers, or recipients, should define your tone as well as aspects of the content.

### Composition and Style

Once you know what you're writing, and for whom you're writing, you actually have to start writing.

A blank, white computer screen is often intimidating. And it's easy to get stuck because you don't know how to start. Try these tips for composing and styling your document:

- **Start with your audience** – Remember, your readers may know nothing about what you're telling them. What do they need to know first?
- **Create an outline** – This is especially helpful if you're writing a longer document such as a report, presentation, or speech. Outlines help you identify which steps to take in which order, and they help you break the task up into manageable pieces of information.
- **Use AIDA** – If you're writing something that must inspire action in the reader, follow the Attention-Interest-Desire-Action (AIDA) formula. These four steps can help guide you through the writing process.
- **Try some empathy** – For instance, if you're writing a sales letter for prospective clients, why should they care about your product or sales pitch? What's the benefit for them? Remember your audience's needs at all times.
- **Use the Rhetorical Triangle** – If you're trying to persuade someone to do something, make sure that you communicate why people should listen to you, pitch your message in a way that engages your audience, and present information rationally and coherently. Our article on the [Rhetorical Triangle](#) can help you make your case in the most effective way.
- **Identify your main theme** – If you're having trouble defining the main theme of your message, pretend that you have 15 seconds to explain your position. What do you say? This is likely to be your main theme.
- **Use simple language** – Unless you're writing a scholarly article, it's usually best to use simple, direct language. Don't use long words just to impress people.

### Structure

Your document should be as "reader friendly" as possible. Use headings, subheadings, bullet points, and numbering whenever possible to break up the text.

After all, what's easier to read – a page full of long paragraphs, or a page that's broken up into short paragraphs, with section headings and bullet points? A document that's easy to scan will get read more often than a document with long, dense paragraphs of text.

Headers should grab the reader's attention. Using [questions](#) is often a good idea, especially in advertising copy or reports, because questions help keep the reader engaged and curious.

In emails and proposals, use short, factual headings and subheadings, like the ones in this article.

Adding [graphs and charts](#) is also a smart way to break up your text. These visual aids not only keep the reader's eye engaged, but they can communicate important information much more quickly than text.

## Grammatical Errors

You probably don't need us to tell you that errors in your document will make you look unprofessional. It's essential to learn grammar properly, and to avoid common mistakes that your spell checker won't find.

Here are some examples of commonly misused words:

### Affect/effect

- "Affect" is a verb meaning to influence. (Example: The economic forecast will affect our projected income.)
- "Effect" is a noun meaning the result or outcome. (Example: What is the effect of the proposal?)

### Then/than

- "Then" is typically an adverb indicating a sequence in time. (Example: We went to dinner, then we saw a movie.)
- "Than" is a conjunction used for comparison. (Example: The dinner was more expensive than the movie.)

### Your/you're

- "Your" is a possessive. (Example: Is that your file?)
- "You're" is a contraction of "you are." (Example: You're the new manager.)
- Note: Also watch out for other common homophones (words that sound alike but have different spellings and meanings) – such as their/they're/there, to/too/two, and so on.

### Its/it's

- "Its" is a possessive. (Example: Is that its motor?)
- "It's" is a contraction of "It is." (Example: It's often that heavy.) (Yes, it is this way around!)

### Company's/companies (and other possessives versus plurals)

- "Company's" indicates possession. (Example: The company's trucks hadn't been maintained properly.)
- "Companies" is plural. (Example: The companies in this industry are suffering.)

#### Tip:

Some of your readers – arguably an increasing number – won't be perfect at spelling and grammar. They may not notice if you make these errors. But don't use this as an excuse: there will usually be people, senior managers in particular, who WILL notice!

Because of this, everything you write should be of a quality that every reader will find acceptable.

## Proofing

The enemy of good proofreading is speed. Many people rush through their documents, but this is how you miss mistakes. Follow these guidelines to check what you've written:

- **Proof your headers and subheaders** – People often skip these and focus on the text alone. Just because headers are big and bold doesn't mean they're error free!
- **Read the document out loud** – This forces you to go more slowly, so that you're more likely to catch mistakes.
- **Use your finger to follow text as you read** – This is another trick that helps you slow down.
- **Start at the end of your document** – Proofread one sentence at a time, working your way from the end to the beginning. This helps you focus on errors, not on content.

## Key Points

More than ever, it's important to know how to communicate your point quickly and professionally. Many people spend a lot of time writing and reading, so the better you are at this form of communication, the more successful you're likely to be.

Identify your audience before you start creating your document. And if you feel that there's too much information to include, create an outline to help organize your thoughts. Learning grammatical and stylistic techniques will also help you write more clearly; and be sure to proof the final document. Like most things, the more you write, the better you're going to be!

## 9.11 Charts and Graphs

### Choosing the right format

'A picture is worth a thousand words.' This is certainly true when you're presenting and explaining data. You can provide tables setting out the figures, and you can talk about numbers, percentages, and relationships forever. However, the chances are that your point will be lost if you rely on these alone. Put up a graph or a chart, and suddenly everything you're saying makes sense!

Graphs or charts help people understand data quickly. Whether you want to make a comparison, show a relationship, or highlight a trend, they help your audience 'see' what you are talking about.

The trouble is there are so many different types of charts and graphs that it's difficult to know which one to choose. Click on the chart option in your spreadsheet program and you're presented with many styles. They all look smart, but which one is appropriate for the data you've collected?

Can you use a bar graph to show a trend? Is a line graph appropriate for sales data? When do you use a pie chart? The spreadsheet will chart anything you tell it to, whether the end result makes sense or not. It just takes its orders and executes them!

To figure out what orders to give, you need to have a good understanding of the mechanics of charts, graphs and diagrams. We'll show you the basics using four very common graph types:

- Line graph.
- Bar graph.
- Pie chart.

- Venn diagram

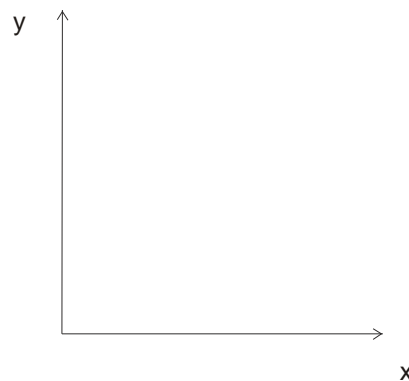
First we'll start with some basics.

### X and Y Axes – Which is Which?

To create most charts or graphs, excluding pie charts, you typically use data that is plotted in two dimensions, as shown in Figure 1.

- The horizontal dimension is the x-axis.
- The vertical dimension is the y-axis.

Figure 1: X and Y Axes

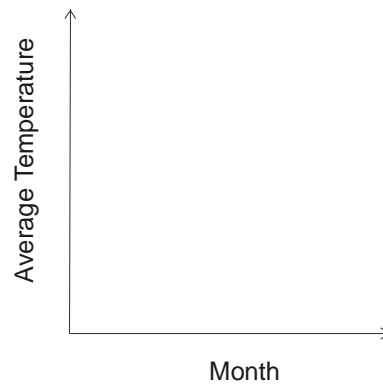


**Tip:**

To remember which axis is which, think of the x-axis as going **along** the corridor and the y-axis as going **up** the stairs. The letter 'a' comes before 'u' in the alphabet just as 'x' comes before 'y'.

When you come to plot data, the known value goes on the x-axis and the measured (or 'unknown') value on the y-axis. For example, if you were to plot the measured average temperature for a number of months, you'd set up axes as shown in Figure 2:

Figure 2: The known value goes on the x axis and the measured value on the y axis



The next issue you face is deciding what type of graph to use.

## Line Graphs

One of the most common graphs you will encounter is a line graph. Line graphs simply use a line to connect the data points that you plot. They are most useful for showing trends, and for identifying whether two variables relate to (or 'correlate with') one another.

Trend data:

- How do sales vary from month to month?
- How does engine performance change as its temperature increases?

Correlation:

- On average, how much sleep do people get, based on their age?
- Does the distance a child lives from school affect how frequently he or she is late?

You can only use line graphs when the variable plotted along the x-axis is continuous – for example, time, temperature or distance.

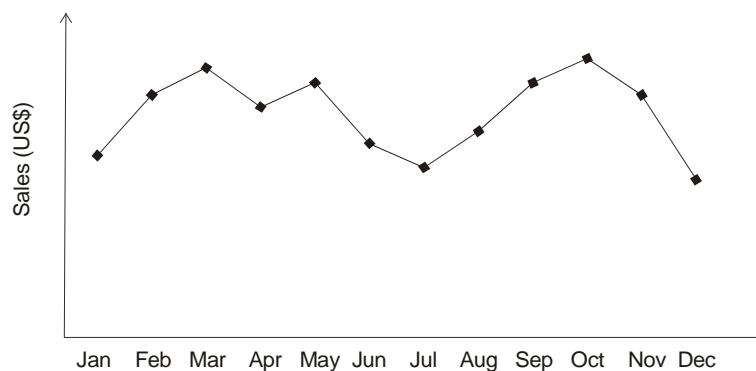
**Note:**

When the y-axis indicates a quantity or percent and the x-axis represents units of time, the line graph is often referred to as a time series graph.

**Example:**

ABC Enterprises' sales vary throughout the year. By plotting sales figures on a line graph, as shown in Figure 3, it's easy to see the main fluctuations during the course of a year. Here, sales drop off during the summer months, and around New Year.

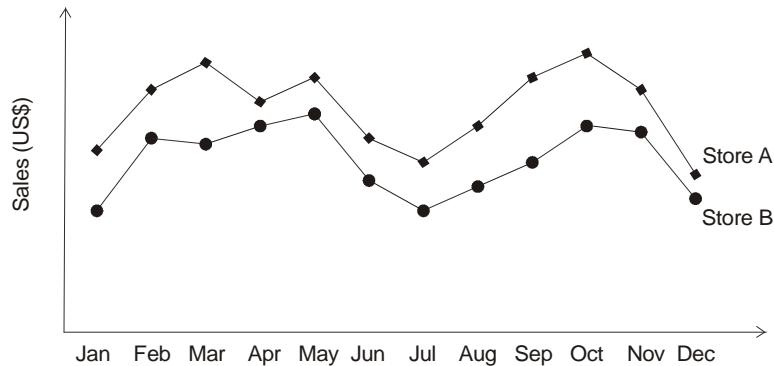
Figure 3: Example of a Line Graph



While some seasonal variation may be unavoidable in the line of business ABC Enterprises is in, it may be possible to boost cash flows during the low periods through marketing activity and special offers.

Line graphs can also depict multiple series. In this example you might have different trend lines for different product categories or store locations, as shown in Figure 4 below. It's easy to compare trends when they're represented on the same graph.

Figure 4: Example of a Line Graph with Multiple Data Series



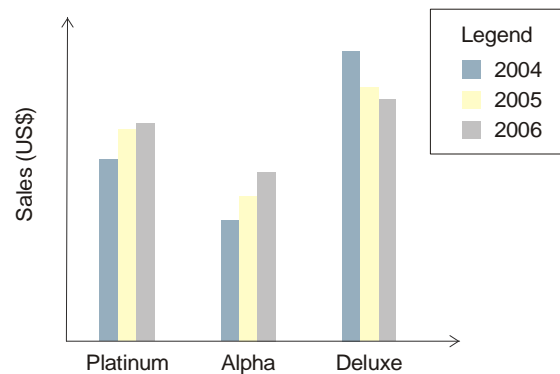
### Bar Graphs

Another type of graph that shows relationships between different data series is the bar graph. Here the height of the bar represents the measured value or frequency: The higher or longer the bar, the greater the value.

#### Example:

ABC Enterprises sells three different models of its main product, the Alpha, the Platinum, and the Deluxe. By plotting the sales each model over a three year period, it becomes easy to see trends that might be masked by a simple analysis of the figures themselves. In Figure 5, you can see that, although the Deluxe is the highest-selling of the three, its sales have dropped off over the three year period, while sales of the other two have continued to grow. Perhaps the Deluxe is becoming outdated and needs to be replaced with a new model? Or perhaps it's suffering from stiffer competition than the other two?

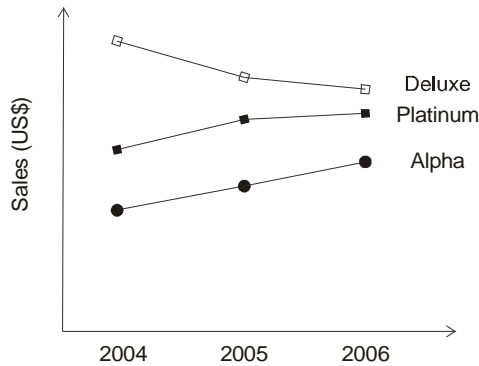
Figure 5: Example of a Bar Chart



Of course, you could also represent this data on a multiple series line graph as shown in Figure 6.



Figure 6: Data from Figure 5  
Shown on a Line Graph



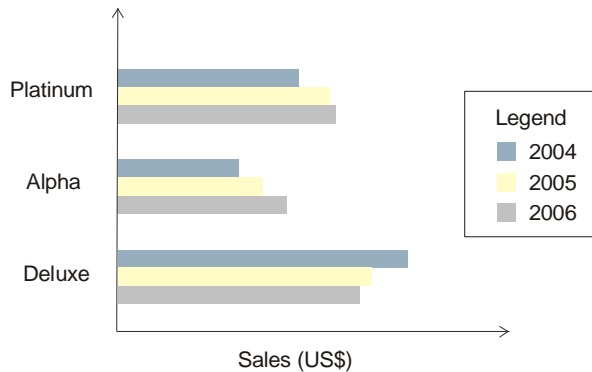
Often the choice comes down to how easy the trend is to spot. In this example the line graph actually works better than the bar graph, but this might not be the case if the chart had to show data for 20 models rather than just three. It's worth noting, though, that if you can use a line graph for your data you can often use a bar graph just as well.

The opposite is not always true. When your x-axis variables represent discontinuous data (such as different products or sales territories), you can only use a bar graph.

In general, line graphs are used to demonstrate data that is related on a continuous scale, whereas bar graphs are used to demonstrate discontinuous data.

Data can also be represented on a horizontal bar graph as shown in Figure 7. This is often the preferred method when you need more room to describe the measured variable. It can be written on the side of the graph rather than squashed underneath the x-axis.

Figure 7: Example of a Horizontal Bar Graph



**Note:**

A bar graph is not the same as a histogram. On a histogram, the width of the bar varies according to the range of the x-axis variable (for example, 0-2, 3-10, 11-20, 20-40 and so on) and the area of the column indicates the frequency of the data. With a bar graph, it is only the height of the bar that matters.

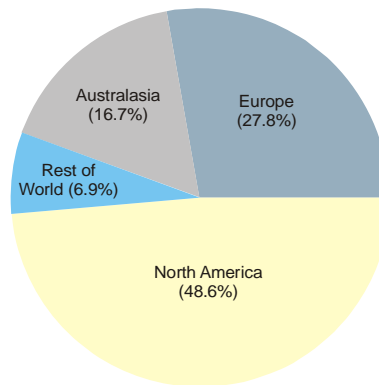
**Pie Charts**

A pie chart compares parts to a whole. As such it shows a percentage distribution. The entire pie represents the total data set and each segment of the pie is a particular category within the whole.

So, to use a pie chart, the data you are measuring must depict a ratio or percentage relationship. You must always use the same unit of measure within a pie chart. Otherwise your numbers will mean nothing.

The pie chart in Figure 8 shows where ABC Enterprise's sales come from.

Figure 8: Example of a PieChart



**Tip 1:**

Be careful not to use too many segments in your pie chart. More than about six and it gets far too crowded. Here it is better to use a bar chart instead.

**Tip 2:**

If you want to emphasize one of the segments, you can detach it a bit from the main pie. This visual separation makes it stand out.

**Tip 3:**

For all their obvious usefulness, pie charts do have limitations, and can be misleading. Click [here](#) for a thoughtful argument against use of pie charts. (Thanks to Anne Chappuis for the reference.)

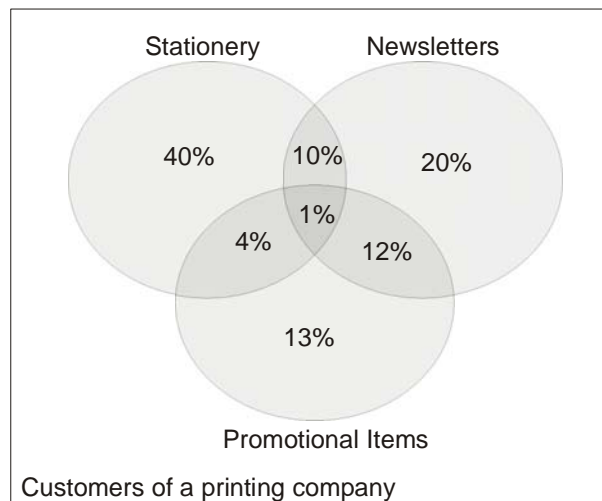
## Venn Diagrams

The last graph we will cover here is the Venn diagram. Devised by the mathematician John Venn in 1881, this is a diagram used to show overlaps between sets of data.

Each set is represented by a circle. The degree of overlap between the sets is depicted by the overlap between circles.

Figure 9 shows sales at Perfect Printing. There are three product lines: stationery printing, newsletter printing, and customized promotional items such as mugs.

Figure 9: An example of a Venn Diagram



By separating out the proportions of the business' customers that buy each type of product, it becomes clear that the majority of the biggest group of customers (55% of the total) – those who have their company stationery printed – are only using Perfect Printing for stationery. It's possible that they don't realize that Perfect Printing could also print their company newsletters and promotional items. As a result, Perfect Printing should consider designing some marketing activity to promote these product lines to its stationery customers.

Customers who get their newsletters printed by Perfect Printing, on the other hand, seem to be well aware that the company also offers stationery printing and promotional items.

A Venn diagram is a great choice to use when you are trying to convey the amount of commonality or difference between distinct groups.

### Key Points

There are many chart and diagram formats you can choose from when representing information graphically. Selecting the right type starts with a good understanding of how each is created.

When you are clear about the specific sort of data the main types can be used to represent, you will be much more comfortable using the different types of chart in your analysis. This will add great value and improve the clarity and effectiveness of your communication.

### Apply This to Your Life:

Next time you are wading through piles of numbers or analyzing relationships between variables, stop and consider how you could summarize the information you are gathering. How could you synthesize this information so that your conclusions, recommendations, or assumptions are clear and understood?

Try creating a few of the example charts using Excel or some other spreadsheet or chart-making software. Get comfortable entering data and creating the charts so that when it comes time to create one for real, you are prepared.

When you read material, be aware of the charts and diagrams presented. Ask yourself whether the author or presenter used the right chart for the job? What other types of charts could have been used? Why do you think he or she decided to use that type of chart? Critique the charts you see and use the information to improve your own chart-making ability.

## 9.12 AIDA: Attention-Interest-Desire-Action

### Inspiring action with your writing

*'Free gift inside!'*

*'Dear Jim, You have been specially selected...'*

*'Calling all Parents.'*

Every day we're bombarded with headlines like these that are designed to grab our attention. In a world full of advertising and information – delivered in all sorts of media from print to websites, billboards to radio, and TV to text messages – every message has to work extremely hard to get noticed.

And it's not just advertising messages that have to work hard; every report you write, presentation you deliver, or email you send is competing for your audience's attention.

As the world of advertising becomes more and more competitive, advertising becomes more and more sophisticated. Yet the basic principles behind advertising copy remain – that it must attract attention and persuade someone to take action. And this idea remains true simply because human nature doesn't really change. Sure, we become increasingly discerning, but to persuade people to do something, you still need to grab their attention, interest them in how your product or service can help them, and then persuade them to take the action you want them to take, such as buying your product or visiting your website.

The acronym AIDA is a handy tool for ensuring that your copy, or other writing, grabs attention. The acronym stands for:

- Attention (or Attract)
- Interest
- Desire
- Action.

These are the four steps you need to take your audience through if you want them to buy your product or visit your website, or indeed to take on board the messages in your report.

A slightly more sophisticated version of this is AIDCA/AIDEA, which includes an additional step of Conviction/Evidence between Desire and Action. People are so cynical about advertising messages that coherent evidence may be needed if anyone is going to act!

### How to Use the Tool

Use the AIDCA approach when you write a piece of text that has the ultimate objective of getting others to take action. The elements of the acronym are as follows:

#### 1. Attention/Attract

In our media-filled world, you need to be quick and direct to grab people's attention. Use powerful words, or a picture that will catch the reader's eye and make them stop and read what you have to say next.

With most office workers suffering from e-mail overload, action-seeking e-mails need subject lines that will encourage recipients to open them and read the contents. For example, to encourage people to attend a company training session on giving feedback, the email headline, 'How effective is YOUR feedback?' is more likely to grab attention than the purely factual one of, 'This week's seminar on feedback'.

#### 2. Interest

This is one of the most challenging stages: You've got the attention of a chunk of your target audience, but can you engage with them enough so that they'll want to spend their precious time understanding your message in more detail?

Gaining the reader's interest is a deeper process than grabbing their attention. They will give you a little more time to do it, but you must stay focused on their needs. This means helping them to pick out the messages that are relevant to them quickly. So use bullets and subheadings, and break up the text to make your points stand out.

For more information on understanding your target audience's interests and expectations, and the context of your message, read our article on the [Rhetorical Triangle](#).

#### 3. Desire

The Interest and Desire parts of AIDA go hand-in-hand: As you're building the reader's interest, you also need to help them understand how what you're offering can help them in a real way. The main way of doing this is by appealing to their personal needs and wants..

So, rather than simply saying 'Our lunchtime seminar will teach you feedback skills', explain to the audience what's in it for them: 'Get what you need from other people, and save time and frustration, by learning how to give them good feedback.'

#### **Feature and Benefits (FAB)**

A good way of building the reader's desire for your offering is to link features and benefits. Hopefully, the significant features of your offering have been designed to give a specific benefit to members of your target market.

When it comes to the marketing copy, it's important that you don't forget those benefits at this stage. When you describe your offering, don't just give the facts and features, and expect the audience to work out the benefits for themselves: Tell them the benefits clearly to create that interest and desire.

Example: 'This laptop case is made of aluminum,' describes a feature, and leaves the audience thinking 'So what?' Persuade the audience by adding the benefits: 'giving a stylish look, that's kinder to your back and shoulders'.

You may want to take this further by appealing to people's deeper drives '... giving effortless portability and a sleek appearance and that will be the envy of your friends and co-workers.'

#### **4. Conviction**

As hardened consumers, we tend to be skeptical about marketing claims. It's no longer enough simply to say that a book is a bestseller, for example, but readers will take notice if you state (accurately, of course!), that the book has been in the New York Times Bestseller List for 10 weeks, for example. So try to use hard data where it's available. When you haven't got the hard data, yet the product offering is sufficiently important, consider generating some data, for example, by commissioning a survey.

#### **5. Action**

Finally, be very clear about what action you want your readers to take; for example, 'Visit [www.mindtools.com](http://www.mindtools.com) now for more information' rather than just leaving people to work out what to do for themselves.

#### **Key Points**

AIDA is a copywriting acronym that stands for:

- Attract or Attention.
- Interest.
- Desire.
- Action.

Using it will help you ensure that any kind of writing, whose purpose is to get the reader to do something, is as effective as possible. First it must grab the target audience's attention, and engage their interest. Then it must build a desire for the product offering, before setting out how to take the action that the writer wants the audience to take.

## 9.13 Running Effective Meetings

Meetings are wonderful tools for generating ideas, expanding on thoughts and managing group activity. But this face-to-face contact with team members and colleagues can easily fail without adequate preparation and leadership.

### The Importance of Preparation

To ensure everyone involved has the opportunity to provide their input, start your meeting off on the right foot by designating a meeting time that allows all participants the time needed to adequately prepare.

Once a meeting time and place has been chosen, make yourself available for questions that may arise as participants prepare for the meeting. If you are the meeting leader, make a meeting agenda, complete with detailed notes.

In these notes, outline the goal and proposed structure of the meeting, and share this with the participants. This will allow all involved to prepare and to come to the meeting ready to work together to meet the [goal\(s\)](#) at hand.

The success of the meeting depends largely on the skills displayed by the meeting leader. To ensure the meeting is successful, the leader should:

- Issue an agenda.
- Start the discussion and encourage active participation.
- Work to keep the meeting at a comfortable pace – not moving too fast or too slow.
- Summarize the discussion and the recommendations at the end of each logical section.
- Ensure all participants receive minutes promptly.

While these tips will help ensure your meeting is productive and well-received, there are other important areas that need to be touched on to make sure your meeting and negotiation skills are fine-tuned.

### Managing a Meeting

Choosing the right participants is key to the success of any meeting. Make sure all participants can contribute and choose good decision-makers and problem-solvers. Try to keep the number of participants to a maximum of 12, preferably fewer. Make sure the people with the necessary information for the items listed in the meeting agenda are the ones that are invited.

**Tip:**

Stop for a minute to consider the hourly cost to your organization of the people attending your meeting. You'll realise that calling a meeting is expensive, so it's important to ensure that every person attending and every minute of your meeting adds value. So don't invite people who won't participate but will simply report back to their boss or team (sending a copy of the minutes will be a more effective way of achieving this). Equally, don't use meetings to tell people things that could be communicated just as effectively by email or memo.

If you are the leader, work diligently to ensure everyone's thoughts and ideas are heard by guiding the meeting so that there is a free flow of debate with no individual dominating and no extensive discussions between two people. As time dwindles for each item on the distributed agenda, you



may find it useful to stop the discussion, then quickly summarize the debate on that agenda item and move on the next item on the agenda.

When an agenda item is resolved or action is agreed upon, make it clear who in the meeting will be responsible for this. In an effort to bypass confusion and misunderstandings, summarize the action to be taken and include this in the meeting's minutes.

### **Time Keeping**

Meetings are notorious for eating up people's time. Here are some ways of ensuring that time is not wasted in meetings:

- Start on time.
- Don't recap what you've covered if someone comes in late: doing so sends the message that it is OK to be late for meetings, and it wastes everyone else's valuable time.
- State a finish time for the meeting and don't over-run.
- To help stick to the stated finish time, arrange your agenda in order of importance so that if you have to omit or rush items at the end to make the finish time, you don't omit or skimp on important items.
- Finish the meeting before the stated finish time if you have achieved everything you need to.

### **Issuing Minutes**

Minutes record the decisions of the meeting and the actions agreed. They provide a record of the meeting and, importantly, they provide a review document for use at the next meeting so that progress can be measured – this makes them a useful disciplining technique as individuals' performance and non-performance of agreed actions is given high visibility.

The style of the minutes issued depends on the circumstances – in situations of critical importance and where the record is important, then you may need to take detailed minutes. Where this is not the case, then minutes can be simple lists of decisions made and of actions to be taken (with the responsible person identified). Generally, they should be as short as possible as long as all key information is shown – this makes them quick and easy to prepare and digest.

It is always impressive if the leader of a meeting issues minutes within 24 hours of the end of the meeting – it's even better if they are issued on the same day.

## **9.14 Ice Breakers**

### **Getting everyone to contribute at the start of a successful event**

Ice Breakers can be an effective way of starting a training session or team-building event. As interactive and often fun sessions run before the main proceedings, they help people get to know each other and buy into the purpose of the event.

If an ice breaker session is well-designed and well-facilitated, it can really help get things off to a great start. By getting to know each other, getting to know the facilitators and learning about the objectives of the event, people can become more engaged in the proceedings and so contribute more effectively towards a successful outcome.

But have you ever been to an event when the ice breaker session went badly? Just as a great ice breaker session can smooth the way for a great event, so a bad ice breaker session can be a recipe

for disaster. A bad ice breaker session is at best simply a waste of time, or worse an embarrassment for everyone involved.

As a facilitator, the secret of a successful icebreaking session is to keep it simple: Design the session with specific objectives in mind and make sure the session is appropriate and comfortable for everyone involved.

This article helps you think through the objectives of your ice breaker session, and then suggests various types of ice breaker you might use. As a facilitator, make sure your ice breakers are remembered for the right reasons – as a great start to a great event!

### **When to Use Icebreakers**

As the name suggests, an ice breaker session is designed to 'break the ice' at an event or meeting. The technique is often used when people who do not usually work together, or may not know each other at all, meet for a specific, common purpose.

Consider using an ice breaker when:

- Participants come from different backgrounds.
- People need to bond quickly so as to work towards a common goal.
- Your team is [newly formed](#).
- The topics you are discussing are new or unfamiliar to many people involved.
- As facilitator you need to get to know participants and have them know you better.

### **So What's the 'Ice'?**

When designing your ice breaker, think about the 'ice' that needs to be broken.

If you are bringing together like-minded people, the 'ice' may simply reflect the fact that people have not yet met.

If you are bringing together people of different grades and levels in your organization for an open discussion, the 'ice' may come from the difference in status between participants.

If you are bringing together people of different backgrounds, cultures and outlooks for work within your community, then the 'ice' may come from people's perceptions of each other.

You'll need to handle these differences sensitively. Only focus on what's important to your event. (Remember, you want to break some ice for your event, not uncover the whole iceberg, or bring about world peace!)

And as you move on to design and facilitate the event, it's always best to focus on similarities (rather than differences), such as a shared interest in the event's outcome.

### **Designing Your Icebreaker**

The key to a successful ice breaker is to make sure the ice breaker is specifically focused on meeting your objectives and appropriate to the group of people involved.

Once you have established what the 'ice' is, the next step is to clarify the specific objectives for your ice breaker session.

For example, when meeting to solve problems at work, the ice breaker objectives may be:

*'To establish a productive working environment for today's event with good participation from everyone involved, irrespective of their level or job role in the organization.'*

With clear objectives, you can start to design the session. Ask yourself questions about how you will meet your objectives. For example:

- 'How will people become comfortable with contributing?
- 'How will you establish a level playing field for people with different levels and jobs?
- 'How will you create a common sense of purpose?'
- and so on.

These questions can be used as a check list once you have designed the ice breaker session:

*'Will this ice breaker session help people feel comfortable... establish a level playing field... etc'*

As a further check, you should also ask yourself how each person is likely to react to the session. Will participants feel comfortable? Will they feel the session is appropriate and worthwhile?

### Example Ice Breakers

There are many types of ice breakers, each suited to different types of objectives. Here we look at a few of the more popular types of ice breakers and how they can be used.

#### Introductory Ice Breakers

Introductory ice breakers are used to introduce participants to each other and to facilitate conversation amongst the participants.

**The Little Known Fact:** Ask participants to share their name, department or role in the organization, length of service, and one little known fact about themselves.

This 'little known fact' becomes a humanizing element that can help break down differences such as grade / status in future interaction.

**True or False:** Ask your participants to introduce themselves and make three or four statements about themselves, one of which is false. Now get the rest of the group to vote on which fact is false.

As well as getting to know each other as individuals, this ice breaker helps to start interaction within the group.

**Interviews:** Ask participants to get into twos. Each person then interviews his or her partner for a set time while paired up. When the group reconvenes, each person introduces their interviewee to the rest of the group.

**Problem Solvers:** Ask participants to work in small groups. Create a simple problem scenario for them to work on in a short time. Once the group have analyzed the problem and prepared their feedback, ask each group in turn to present their analysis and solutions to the wider group.

#### Tip:

Choose a fairly simple scenario that everyone can contribute to. The idea is not to solve a real problem but to 'warm up' the group for further interaction or problem solving later in the event. The group will also learn each other's styles of problem-solving and interaction.

## Team-Building Ice Breakers

Team-building ice breakers are used to bring together individuals who are in the early stages of team building. This can help the people start working together more cohesively towards shared goals or plans.

**The Human Web:** This ice breaker focuses on how people in the group inter-relate and depend on each other.

The facilitator begins with a ball of yarn. Keeping one end, pass the ball to one of the participants, and the person to introduce him- or her-self and their role in the organization. Once this person has made their introduction, ask him or her to pass the ball of yarn on to another person in the group. The person handing over the ball must describe how he/she relates (or expects to relate) to the other person. The process continues until everyone is introduced.

To emphasize the interdependencies amongst the team, the facilitator then pulls on the starting thread and everyone's hand should move.

**Ball Challenge:** This exercise creates a simple, timed challenge for the team to help focus on shared goals, and also encourages people to include other people.

The facilitator arranges the group in a circle and asks each person to throw the ball across the circle, first announcing his or her own name, and then announcing the name of the person to whom they are throwing the ball (the first few times, each person throws the ball to someone whose name they already know.) When every person in the group has thrown the ball at least once, it's time to set the challenge – to pass the ball around all group members as quickly as possible. Time the process, then ask the group to beat that timing. As the challenge progresses, the team will improve their process, for example by standing closer together. And so the group will learn to work as a team.

**Hope, Fears and Expectations:** Best done when participants already have a good understanding of their challenge as a team. Group people into 2s or 3s, and ask people to discuss their expectations for the event or work ahead, then what they fears and their hopes. Gather the group's response by collating 3-4 hopes, fears and expectation from pairing or threesome.

## Topic exploration ice breakers

Topic exploration ice breakers can be used to explore the topic at the outset, or perhaps to change pace and re-energize people during the even.

**Word association:** This ice breaker helps people explore the breadth of the area under discussion. Generate a list of words related to the topic of your event or training. For example, in a health and safety workshop, ask participants what words or phrases come to mind relating to 'hazardous materials'. Participants may suggest: 'danger,' 'corrosive,' 'flammable,' 'warning,' 'skull and crossbones,' etc. Write all suggestions on the board, perhaps clustering by theme. You can use this opportunity to introduce essential terms and discuss the scope (what's in and what's out) of your training or event.

**Burning questions:** This ice breaker gives each person the opportunity to ask key questions they hope to cover in the event or training. Again you can use this opportunity to discuss key terminology and scope. Be sure to keep the questions and refer back to them as the event progresses and concludes.

**Brainstorm:** [Brainstorming](#) can be used as an ice breaker or re-energizer during an event. If people are getting bogged down in the detail during problem solving, for example, you can change pace easily by running a quick-fire brainstorming session. If you are looking for answers to customer service problems, try brainstorming how to create problems rather than solve them.

This can help people think creatively again and gives the group a boost when energy levels are flagging.

## 9.15 Facilitation

### Guiding an event through to a successful conclusion

So you've been asked to facilitate a meeting. What does that mean exactly? Do you just ensure everyone's introduced, and maybe kick off with a quick ice breaker exercise? Is your main role simply to stand by the flip chart and note down all the ideas? What preparation do you need to do? How do you manage the event, and how exactly do you pull the whole thing together?

In many types of group situation, and particularly in complex discussions or those where people have different views and interests, good facilitation can make the difference between success and failure.

As a facilitator, you may need to call on a wide range of skills and tools, from problem solving and decision making, to team management and communications.

#### What Is a Facilitator?

The definition of facilitate is 'to make easy' or 'ease a process'. What a facilitator does is plan, guide and manage a group event to ensure that the group's objectives are met effectively, with clear thinking, good participation and full buy-in from everyone who is involved.

To facilitate effectively, you must be objective. This doesn't mean you have to come from outside the organization or team, though. It simply means that, for the purposes of this group process, you will take a neutral stance. You step back from the detailed content and from your own personal views, and focus purely on the group process. (The 'group process' is the approach used to manage discussions, get the best from all members, and bring the event through to a successful conclusion. How you design this depends on many factors, and we'll explore this in a little more detail later in the article. The secret of great facilitation is a group process that flows – and with it will flow the group's ideas, solutions, and decisions too.)

Your key responsibility as a facilitator is to create this group process and an environment in which it can flourish, and so help the group reach a successful decision, solution or conclusion.

#### Tip:

Facilitation can take a lot of mental effort, meaning that it can be difficult to think about and contribute content while facilitating. Neutrality is also important. So if you have an interest in the outcome, or have skills, experience, information or authority which is important for a successful outcome, then consider bringing in an external facilitator.

#### What Does a Facilitator Do?

To facilitate an event well, you must first understand the group's desired outcome, and the background and context of the meeting or event. The bulk of your responsibility is then to:

- **Design and plan** the group process, and select the tools that best help the group progress towards that outcome.
- **Guide and control** the group process to ensure that:
  - There is effective participation.

- Participants achieve a mutual understanding;
- Their contributions are considered and included in the ideas, solutions or decisions that emerge.
- Participants take shared responsibility for the outcome.
- Ensure that outcomes, actions and questions are properly **recorded and actioned**, and appropriately dealt with afterwards.

We look in more detail at most important of these areas below.

## Design and Plan

With the group's objective firmly in mind, preparation for the meeting or event is all-important. Your job is to choose and design the right group process(es), and develop an effective agenda for the occasion.

### Tip 1: Focus on Outcomes

Whether you're planning a straight-forward meeting, or a complex event over several sessions or days, it's important to keep in mind always the **outcome** – and how you are helping the group reach it.

If the event spans multiple sessions and topics, make sure you are clear about both the desired outcome and process for each one. And make sure you know how the outcome of each session or topic contributes to the outcome of the event overall.

### Tip 2: Involve your client!

If you've been asked to facilitate an event by someone else, make sure you consult him or her carefully as to the final 'shape' of the event. Even if they haven't been explicit about what they want, they probably have an idea of what they want, and will be unpleasantly surprised if this isn't delivered.

Two key aspects of the design and planning are choosing the right group process, and designing a realistic agenda.

## Choose and design the group process

There are as many ways to design a group process as there are events to facilitate: It's quite an art! Group process design is also a huge topic in its own right, and something that professional facilitators learn through experience and training.

Here we consider some of the basic options and principle. And there are many tools and techniques here at Mind Tools that will help you facilitate effectively (see the Facilitators' Toolbox below for more details). There are also many wonderful books and guides on the subject – we recommend that you consult some of these if you're new to facilitation, or if you're facing the challenge of facilitating a particularly difficult event.

Here are some of the just some of the factors and options to consider:

- **Do you want an open discussion, or a structured process?** An open discussion, well facilitated, may be the simplest option for your group process. But ask yourself whether you will be able to achieve the participation you need, and manage the discussion with the number of participants involved with this format. Can you cover the variety of topics needed? Can you generate enough ideas and solutions? And can you involve everyone, and get their buy-in?

- **What structured process should you choose?** If you need to accommodate participation from a large group, consider smaller 'break-out' groups. Are you concerned about getting enough participation? Then give people time in the agenda to think about and write down the things they want to contribute. If you want to get ideas flowing, then consider including a brainstorming session. More information about different structured processes can be found in the Facilitators' Toolbox below.
- **Other factors to consider:** You won't be able to change some constraints. However, you may be able to change others to optimize your process and agenda. As part of this, consider:
  - The number of participants.
  - The nature of the topics under discussion.
  - The type of involvement people need to have.
  - The background and positions of the participants.
  - How well they know the subject. and each other.
  - The time you have available.

Remember, whatever group process you define, it's a question of keeping your focus on outcomes. Find the best way to achieve the objectives of the overall event.

### **Facilitators' Toolbox**

Here are just some of the tools and techniques at Mind Tools that can help make a great meeting or event:

**Ice Breakers** – Easing group contribution.

**Nominal Group Technique** – Prioritizing issues to achieve consensus.

**Multi-Voting** – Choosing fairly between many options.

**Brainstorming** – Generating many radical ideas.

**The Charette Procedure** – Brainstorming many ideas with many people.

**The Delphi Technique** – Achieving consensus among experts.

**Concept Attainment** – Reaching a shared understanding of issues.

**Role Playing** – Preparing for difficult situations.

**Avoiding Groupthink** – Avoiding fatal flaws in group decision-making.

As well as these, several sections are packed with useful tools and techniques:

**Strategy Tools** – Tools and techniques that help you understand your environment and think about the best way forward.

**Creativity Tools** – Tools that help you develop creative solutions to problems.

**Problem Solving Tools** – Which help you understand and solve complex problems.

**Decision Making Techniques** – Giving you good formal tools for making difficult decisions.



## Designing a realistic agenda

Designing the agenda goes hand in hand with designing the group process. As you iterate between designing the process and designing the agenda, the event starts to take shape. Among the factors to consider when planning the agenda are:

- In what order should the topics be presented?
- How will participants get to know each other?
- How will they gain a common understanding of the objectives?
- If an event is to be broken into separate sessions, how much time should be allocated to each item?
- Will all participants be involved each session?
- Or will some be in smaller, break-out groups?
- How and when will break-out groups' feed back to the wider group?
- When will you recap and summarize?
- How will the outcomes of one session flow into the next?
- How will you achieve closure of the overall event?

By the end of the design and planning stage, you should have a solid agenda, which focuses on outcomes, and provides a good flow and structure for the event.

## Other design and planning considerations

In addition to process and agenda, you should also consider the following:

- **Information and materials** – What do participants need to know before or at the event? How will this be provided and when?
- **Room arrangements** – What room set-up will best encourage participation? Are separate rooms needed for break out groups?
- **Supplies** – What supplies and props do you need? Pens, flip charts, post-it notes are just the starters – make sure you have everything you need for the agenda and process you've planned. And make sure you have backups for things like data projectors, just in case these fail.

With the agenda and group process in place, it's time to think about how you'll guide and control the proceedings. There's still some preparation to do for this, and then there's whole business of guiding and controlling the event itself.

The final stage of preparation is to think about how you'll guide and control the meeting. This is where you prepare the ground rules for the event, polish your facilitation skills, and also consider some what-if scenarios: What if there is major disagreement? What if a solution does not emerge? and so on.

At the meeting itself, as facilitator, you'll set the scene and ensure that participants are clear about the desired outcome, the agenda, the ground rules and expectations for the event. By doing this, you help everyone focus on the task at hand. At the start of the meeting, and throughout, your role is to use to ensure the meeting keeps progressing towards a successful outcome.

To guide and control the meeting, you will need to:

- **Set the ground rules** – What rules should participants follow in the meeting? How will people interact? How will you ensure that people respect each others ideas? How will questions be handled? You'll prepare some ground rules in advance, and propose and seek agreement to these at the start of the event.

- **Set the scene** – Here, you'll run through the objectives and agenda. Make sure everyone understands their role, and what the group is seeking to achieve.
- **Get things flowing** – You'll make sure everyone introduces themselves, or perhaps use appropriate icebreakers to get the meeting off to a positive start. (For more ideas on ice breaking exercises click [here](#)).
- **Keep up the momentum and energy** – You might need to intervene as the proceedings and energy levels proceed. Make sure people remain focused and interested. (If energy levels are beginning to flag, perhaps it's time to take a break?)
- **Listen, engage and include** – Even though, as facilitator, you're taking a neutral stance, you need to stay alert, listen actively, and remain interested and engaged. This sets a good example for other participants, and also means you are always ready to intervene in facilitative ways. Is everyone engaged? If not, how can you bring them in? How can you get better participation?
- **Monitor checkpoints, and summarize** – Keep in control of the agenda, tell people what they've achieved and what's next; Summarize often.
- **Intervene only if absolutely required.**

**Tip: Interventions**

As a facilitator, there are many situations in which you may need to intervene. Rehearse when and how you'll do this. Keep the lightest of touch. And bear in mind the need to remain objective, keep focus on the desired outcomes, and generally maintain a positive flow.

The most difficult types of intervention are those involving conflict, anger and disagreement. Remembering your role, it's important to focus on the needs of the group, whilst considering the feelings and position of both parties involved in any disagreement.

To keep the event flowing and positive:

- Watch for and close any side conversations. These limit the ability of others to focus, and often people are exchanging ideas that should be brought to the group.
- Keep a close eye on the timing. Be flexible, and balance the need for participation with the need to keep things running efficiently.
- Learn what to do when a discussion isn't reaching a natural conclusion. Is more information needed? When and how will the discussion proceed? Park topics that cannot be concluded, and ensure that action time is scheduled to address these issues.
- Be on the lookout for people who aren't participating fully. Are they experiencing discomfort? What is the source of the discomfort? What can you do to bring them into the conversation?
- Pay attention to group behavior, both verbal and non-verbal. Some of the most damaging behavior is silent, so know how to spot it and stop it effectively.
- Step in and mediate immediately if there are obvious personal attacks. Effective facilitators look for the least intrusive intervention first, so reminding everyone of the ground rules is often a good place to start. Whatever the issue, you can't allow bad behavior to continue so be prepared to take the steps necessary to stop attacks.

**Record and Action**

Last but not least among the responsibilities of a facilitator is the recording of outputs, and of bringing these together, sharing them, and making sure they are actioned.

The key to successful recording of outputs from an event is to be clear about what will be recorded, how and by whom. Make sure people's responsibilities are 100% clear, whether they are yours or others' involved.

**Tip:**

When we think of a facilitator, it's the recording function part of their role that most often comes to mind. We see a person standing in front of an easel that is packed with paper, with felt pen in hand, and ready to write furiously when the ideas start flowing.

While this is an important function, remember that, for the ideas to flow, the planning, and guiding and controlling functions must be attended to first. You can have all the paper in the world but if your meeting is not well planned, guided, and controlled, you could be facing an empty piece of paper at the end of the event.

When you are recording and actioning, here are some things to remember:

- You are responsible for making sure the participants hear, see, and understand the information that is presented and offered. Make sure you keep an accurate record of what's going on. If in doubt, record now and summarize later.
- Try to use words that the group chooses, and when in doubt, ask them to provide the words for you to record.
- Ensure all decisions and actions are recorded. You may want to use a scribe to do this, so that you can stay focused on the group and the process.
- As you record decisions and actions, check with the group that the information you're recording is a fair and accurate reflection of what's been discussed.
- Remind the group what has been discussed, and keep them focused and moving forward.
- If in doubt, ask for clarification before the discussion moves on.
- Make sure that responsibility for, and commitment to, action, is obtained and recorded when necessary.
- After the event, follow up to ensure that outstanding actions and issues are progressed, and that the proceedings are brought to a successful conclusion.

**Key Points**

To be an effective facilitator you must know when to take a leadership role, and when to be neutral and take a back seat. This is a difficult balance to maintain! The key to being proficient in the role is to plan and guide the proceedings effectively, and remain focused on the group process and outcomes, rather than specific content and opinions involved.

Facilitation is an interesting, rewarding and important role to take on. When facilitating, take time to think about the process and agenda, and learn the skills you need to take the event through to a successful conclusion. Take pride in the role of facilitation, and enjoy watching the ideas, solutions and successful outcomes flow!

## 9.16 Win-Win Negotiation

### Finding a fair compromise

Worksheet

Do you feel that someone is continually taking advantage of you? Do you seem to have to fight your corner aggressively, or ally with others, to win the resources you need? Or do you struggle to get what you want from people whose help you need, but over whom you have little direct authority? If so, you may need to brush up your win-win negotiation skills.

Effective negotiation helps you to resolve situations where what you want conflicts with what someone else wants. The aim of win-win negotiation is to find a solution that is acceptable to both parties, and leaves both parties feeling that they've won, in some way, after the event.

There are different styles of negotiation, depending on circumstances.

Where you do not expect to deal with people ever again and you do not need their goodwill, then it may be appropriate to 'play hardball', seeking to win a negotiation while the other person loses out. Many people go through this when they buy or sell a house – this is why house-buying can be such a confrontational and unpleasant experience.

Similarly, where there is a great deal at stake in a negotiation, then it may be appropriate to prepare in detail and legitimate 'gamesmanship' to gain advantage. Anyone who has been involved with large sales negotiations will be familiar with this.

Neither of these approaches is usually much good for resolving disputes with people with whom you have an ongoing relationship: If one person plays hardball, then this disadvantages the other person – this may, quite fairly, lead to reprisal later. Similarly, using tricks and manipulation during a negotiation can undermine trust and damage teamwork. While a manipulative person may not get caught out if negotiation is infrequent, this is not the case when people work together routinely. Here, honesty and openness are almost always the best policies.

### Preparing for a successful negotiation...

Depending on the scale of the disagreement, some preparation may be appropriate for conducting a successful negotiation.

For small disagreements, excessive preparation can be counter-productive because it takes time that is better used elsewhere. It can also be seen as manipulative because, just as it strengthens your position, it can weaken the other person's.

However, if you need to resolve a major disagreement, then make sure you prepare thoroughly. Using our free worksheet, think through the following points before you start negotiating:

- **Goals:** what do you want to get out of the negotiation? What do you think the other person wants?
- **Trades:** What do you and the other person have that you can trade? What do you each have that the other wants? What are you each comfortable giving away?
- **Alternatives:** if you don't reach agreement with the other person, what alternatives do you have? Are these good or bad? How much does it matter if you do not reach agreement? Does failure to reach an agreement cut you out of future opportunities? And what alternatives might the other person have?
- **Relationships:** what is the history of the relationship? Could or should this history impact the negotiation? Will there be any hidden issues that may influence the negotiation? How will you handle these?
- **Expected outcomes:** what outcome will people be expecting from this negotiation? What has the outcome been in the past, and what precedents have been set?
- **The consequences:** what are the consequences for you of winning or losing this negotiation? What are the consequences for the other person?

- **Power:** who has what power in the relationship? Who controls resources? Who stands to lose the most if agreement isn't reached? What power does the other person have to deliver what you hope for?
- **Possible solutions:** based on all of the considerations, what possible compromises might there be?

### Style is critical...

For a negotiation to be 'win-win', both parties should feel positive about the negotiation once it's over. This helps people keep good working relationships afterwards. This governs the style of the negotiation – histrionics and displays of emotion are clearly inappropriate because they undermine the rational basis of the negotiation and because they bring a manipulative aspect to them.

Despite this, emotion can be an important subject of discussion because people's emotional needs must fairly be met. If emotion is not discussed where it needs to be, then the agreement reached can be unsatisfactory and temporary. Be as detached as possible when discussing your own emotions – perhaps discuss them as if they belong to someone else.

### Negotiating successfully...

The negotiation itself is a careful exploration of your position and the other person's position, with the goal of finding a mutually acceptable compromise that gives you both as much of what you want as possible. People's positions are rarely as fundamentally opposed as they may initially appear – the other person may have very different goals from the ones you expect!

In an ideal situation, you will find that the other person wants what you are prepared to trade, and that you are prepared to give what the other person wants.

If this is not the case and one person must give way, then it is fair for this person to try to negotiate some form of compensation for doing so – the scale of this compensation will often depend on the many of the factors we discussed above. Ultimately, both sides should feel comfortable with the final solution if the agreement is to be considered win-win.

Only consider win-lose negotiation if you don't need to have an ongoing relationship with the other party as, having lost, they are unlikely to want to work with you again. Equally, you should expect that if they need to fulfill some part of a deal in which you have 'won,' they may be uncooperative and legalistic about the way they do this.

## 9.17 Hofstede's Cultural Dimensions

### Understanding workplace values around the world

We know we are living in a global age. Technology has brought the world much closer together. This means that people of different cultures find themselves working together and communicating more and more.

This is exciting and interesting, but it can also be frustrating and fraught with uncertainty. How do you relate to someone of another culture? What do you say, or not say, to start a conversation off right? Are there cultural taboos you need to be aware of?

Building connections with people from around the world is just one dimension of cultural diversity. You also have issues like motivating people, structuring projects, and developing strategy.

What works in one location may or may not work somewhere else. The question is, 'How can I come to understand these cultural differences?' Are we relegated to learning from our mistakes or are there generalized guidelines to follow?

Fortunately, a psychologist named Dr Geert Hofstede asked himself this question in the 1970s. What emerged after a decade of research and thousands of interviews is a model of cultural dimensions that has become an internationally recognized standard.

With access to people working for the same organization in over 40 countries of the world, Hofstede collected cultural data and analyzed his findings. He initially identified four distinct cultural dimensions that served to distinguish one culture from another. Later he added a fifth dimension and that is how the model stands today.

He scored each country using a scale of roughly 0 to 100 for each dimension. The higher the score, the more that dimension is exhibited in society.

### The Five Dimensions of Culture

Armed with a large database of cultural statistics, Hofstede analyzed the results and found clear patterns of similarity and difference amid the responses along these five dimensions. Interestingly, his research was done on employees of IBM only, which allowed him to attribute the patterns to national differences in culture, largely eliminating the problem of differences in company culture.

The five dimensions are:

**1. Power/Distance (PD)** – This refers to the degree of inequality that exists – and is accepted – among people with and without power. A high PD score indicates that society accepts an unequal distribution of power and people understand 'their place' in the system. Low PD means that power is shared and well dispersed. It also means that society members view themselves as equals.

Application: According to Hofstede's model, in a high PD country like Malaysia (104), you would probably send reports only to top management and have closed door meetings where only a select few, powerful leaders were in attendance.

	Characteristics	Tips
<b>High PD</b>	Centralized companies. Strong hierarchies. Large gaps in compensation, authority, and respect.	Acknowledge a leader's power. Be aware that you may need to go to the top for answers
<b>Low PD</b>	Flatter organizations. Supervisors and employees are considered almost as equals.	Use teamwork Involve as many people as possible in decision making.

**2. Individualism (IDV)** – This refers to the strength of the ties people have to others within the community. A high IDV score indicates a loose connection with people. In countries with a high IDV score there is a lack of interpersonal connection and little sharing of responsibility, beyond family and perhaps a few close friends. A society with a low IDV score would have strong group cohesion, and there would be a large amount of loyalty and respect for members of the group. The group itself is also larger and people take more responsibility for each other's well being.

Application: Hofstede's analysis suggests that in the Central American countries of Panama and Guatemala where the IDV scores are very low (11 and 6, respectively), a marketing campaign that emphasized benefits to the community or that tied into a popular political movement would likely be understood and well-received.

	<b>Characteristics</b>	<b>Tips</b>
<b>High IDV</b>	High valuation on people's time and their need for freedom. An enjoyment of challenges, and an expectation of rewards for hard work. Respect for privacy.	Acknowledge accomplishments. Don't ask for too much personal information. Encourage debate and expression of own ideas.
<b>Low IDV</b>	Emphasis on building skills and becoming masters of something. Work for intrinsic rewards. Harmony more important than honesty.	Show respect for age and wisdom. Suppress feelings and emotions to work in harmony. Respect traditions and introduce change slowly.

**3. Masculinity (MAS)** – This refers to how much a society sticks with, and values, traditional male and female roles. High MAS scores are found in countries where men are expected to be tough, to be the provider, to be assertive and to be strong. If women work outside the home, they have separate professions from men. Low MAS scores do not reverse the gender roles. In a low MAS society, the roles are simply blurred. You see women and men working together equally across many professions. Men are allowed to be sensitive and women can work hard for professional success.

Application: Japan is highly masculine with a score of 95 whereas Sweden has the lowest measured value (5). According to Hofstede's analysis, if you were to open an office in Japan, you might have greater success if you appointed a male employee to lead the team and had a strong male contingent on the team. In Sweden, on the other hand, you would aim for a team that was balanced in terms of skill rather than gender.

	<b>Characteristics</b>	<b>Tips</b>
<b>High MAS</b>	Men are masculine and women are feminine. There is a well defined distinction between men's work and women's work.	Be aware that people may expect male and female roles to be distinct. Advise men to avoid discussing emotions or making emotionally-based decisions or arguments.
<b>Low MAS</b>	A woman can do anything a man can do. Powerful and successful women are admired and respected.	Avoid an 'old boys' club' mentality. Ensure job design and practices are not discriminatory to either gender. Treat men and women equally.



**4. Uncertainty/Avoidance Index (UAI)** – This relates to the degree of anxiety society members feel when in uncertain or unknown situations. High UAI-scoring nations try to avoid ambiguous situations whenever possible. They are governed by rules and order and they seek a collective ‘truth’. Low UAI scores indicate the society enjoys novel events and values differences. There are very few rules and people are encouraged to discover their own truth.

Application: Hofstede's Cultural Dimensions imply that when discussing a project with people in Belgium, whose country scored a 94 on the UAI scale, you should investigate the various options and then present a limited number of choices, but have very detailed information available on your contingency and risk plans. (Note that there will be cultural differences between French and Dutch speakers in Belgium!)

	<b>Characteristics</b>	<b>Tips</b>
<b>High UAI</b>	Very formal business conduct with lots of rules and policies. Need and expect structure. Sense of nervousness spurns high levels of emotion and expression. Differences are avoided.	Be clear and concise about your expectations and parameters. Plan and prepare, communicate often and early, provide detailed plans and focus on the tactical aspects of a job or project. Express your emotions through hands gestures and raised voices.
<b>Low UAI</b>	Informal business attitude. More concern with long term strategy than what is happening on a daily basis. Accepting of change and risk.	Do not impose rules or structure unnecessarily. Minimize your emotional response by being calm and contemplating situations before speaking. Express curiosity when you discover differences.

**5. Long Term Orientation (LTO)** – This refers to how much society values long-standing – as opposed to short term – traditions and values. This is the fifth dimension that Hofstede added in the 1990s after finding that Asian countries with a strong link to Confucian philosophy acted differently from western cultures. In countries with a high LTO score, delivering on social obligations and avoiding ‘loss of face’ are considered very important.

Application: According to Hofstede's analysis, people in the United States and United Kingdom have low LTO scores. This suggests that you can pretty much expect anything in this culture in terms of creative expression and novel ideas. The model implies that people in the US and UK don't value tradition as much as many others, and are therefore likely to be willing to help you execute the most innovative plans as long as they get to participate fully. (This may be surprising to people in the UK, with its associations of tradition!)

	<b>Characteristics</b>	<b>Tips</b>
<b>High LTO</b>	<p>Family is the basis of society.</p> <p>Parents and men have more authority than young people and women.</p> <p>Strong work ethic.</p> <p>High value placed on education and training.</p>	<p>Show respect for traditions.</p> <p>Do not display extravagance or act frivolously.</p> <p>Reward perseverance, loyalty, and commitment.</p> <p>Avoid doing anything that would cause another to 'lose face'.</p>
<b>Low LTO</b>	<p>Promotion of equality.</p> <p>High creativity, individualism.</p> <p>Treat others as you would like to be treated.</p> <p>Self-actualization is sought.</p>	<p>Expect to live by the same standards and rules you create.</p> <p>Be respectful of others.</p> <p>Do not hesitate to introduce necessary changes.</p>

For a list of scores by dimension per country and more detailed information about Hofstede's research, visit his [website](#).

**Note:**

Hofstede's analysis is done by country. While this is valid for many countries, it does not hold in the countries where there are strong subcultures that are based on ethnicity of origin or geography. In Canada, for instance, there is a distinct French Canadian culture that has quite a different set of norms compared to English-speaking Canada. And in Italy, masculinity scores would differ between North and South.

**Key Points**

Cultural norms play a large part in the mechanics and interpersonal relationships at work. When you grow up in a culture you take your norms of behavior for granted. You don't have to think about your reactions, preferences, and feelings.

When you step into a foreign culture, suddenly things seem different. You don't know what to do or say. Using Hofstede's Cultural Dimensions as a starting point, you can evaluate your approach, your decisions, and actions based on a general sense of how the society might think and react to you.

Of course, no society is homogenous and there will be deviations from the norms Hofstede found, however, with this as your guide you won't be going in blind. The unknown will be a little less intimidating and you'll get a much-needed boost of confidence and security from studying this cultural model.

### **Apply This to Your Life:**

Take some time to review the [scores by country](#) for the various cultural dimensions Hofstede identified. Pay particular attention to the countries from which the people you deal with on a day-by-day basis come.

In light of these scores, think about some interactions you've had with people in other countries. Does your conversation or association make more sense given this newly found insight?

Challenge yourself to learn more about one culture in particular. If your work brings you in contact with people from another country, use that country as your point of reference. Apply Hofstede's scores to what you discover and determine the accuracy and relevance for you.

The next time you are required to work with a person from a different culture, use Hofstede's scores and make notes about your approach, what you should be prepared to discuss, and why you feel the way you do. Afterward, evaluate your performance and do further research and preparation for the next time.

Above all, make cultural sensitivity a daily part of your life. Learn to value the differences between people and vow to honor and respect the things that make each nation of people unique.

## Section 10: Career Skills

- Introduction to Career Skills
- Finding Career Direction
- Creating Job Satisfaction
- Using Holland's Codes
- Getting a New Boss
- Job Crafting
- Future Proof Your Career
- Overcoming a Lack of Qualifications
- Managing Your Emotions at Work
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- Get the Recognition You Deserve
- Living with a Lack of Job Security
- Life After Job Loss
- Breaking the Glass Ceiling
- A Happy Ending

## 10. Introduction to Career Skills

This section of Mind Tools looks at tools and approaches you can use to manage your career successfully.

It starts with five articles which help you **think about career direction**. These tools help you uncover what you do best and identify the types of work that you'll enjoy doing most. From this, you can figure out how to make the most of your skills and preferences, whether in your current role or in a new one.

Amongst these, our article on [Personal SWOT Analysis](#) shows you how you can apply the well-known SWOT strategy tool to your life and career, helping you identify your strengths and weaknesses as well as the opportunities open to you and the threats you face. This leads naturally into the idea of [job crafting](#). This is something that many of us do subconsciously to some extent, but our article gives you a rigorous approach that you can use to craft your ideal job.

Our next group of articles help you to **develop your career** in various ways. We show you what you can be doing now to [future proof your career](#) and to [get ready for promotion](#). And if you're frustrated because your hard work and abilities are going unnoticed, find out how to [get the recognition you deserve](#).

Of course, despite your best efforts and preparation, careers don't always go to plan, especially in a volatile economic climate. So we show you how to [live with a lack of job security](#) and how to cope with [life after job loss](#). Yet even when the economy's booming, you can still face **challenging career situations** such as hitting a "[glass ceiling](#)". Find out what you can do to break through these!

We round off this section with two articles that will help you **transition through significant events in your career**. First, we look at what you can do when you [get a new boss](#), and then we see how to [wrap up in one role before moving on](#).

### 10.1 Finding Career Direction

#### Discover yourself and your purpose

How long has it been since you asked yourself what you want to be when you grow up?

If you haven't considered the idea since high school, then you may have settled into a job that is not fulfilling your professional aspirations, or your purpose.

Each of us has particular talents that, when expressed or exercised, make the world a better place. Most likely you enjoy doing these things, and you find that people respond well to you when you do them. Perhaps they're something you gravitate towards during out-of-hours activities, and that people respect you for.

When you develop these talents as far as you can, you can make your greatest possible contribution to the world, and enjoy personal and professional satisfaction that goes along with this.

#### Your Career Direction Journey

The process of uncovering what you are meant to do, that is finding career direction, is a journey. It starts with discovering the essential "you": the person who truly resides behind the facades, defenses, and stresses of everyday life.

Once unmasked, your journey continues with specific career exploration and identification of a career that allows you to make good use of your talents. And it moves on with a focused job or career move, in which you identify the jobs you want and put yourself in the best possible position to get them. In fact, this journey never really ends because work itself is all about change, growth, development, and reinvention.

By taking a talent-based approach to your career search right from the start, you keep yourself heading toward the right career even when the actual direction shifts over time. This approach consists of sequentially answering three questions:

1. Who Am I?
2. What Do I Want to Do?
3. How Do I Get Hired?

### 1. Discovering Who You Really Are

The first question to answer is "**Who am I?**"

We'll take two approaches to answering this - firstly asking you to explore your talents, and secondly using psychometric tests to explore your preferences.

#### Exploring Your Talents

First of all, consider your answers to the following questions:

- When have you been most committed, passionate and enthusiastic?
- When have you been most creative?
- When have you been most sure of yourself and your decisions?
- What do you consider to be your greatest accomplishment?
- When have other people considered you to be most successful?
- When have you enjoyed your work most?
- What talents were you relying on, and using, in these situations?
- For what would you take a very strong stand?
- What about the world puzzles or disturbs you that you could make an impact on?
- What jobs do you like to do at work when you have a choice?
- What activities are you drawn towards out of work?
- If money were no concern, what would you be doing?

Brainstorm each of these questions, and then use your answers to identify the top three talents that you most use when you're successful. Rank these in order.

**Tip:**

If you're having problems choosing, use a technique like [paired comparison analysis](#) to rank things in order.

#### Personality Inventories

Next, we'll look at using personality inventories as a way of looking at your preferred way of working relative to other people.

There are many typologies available including [Myers-Briggs](#), [DISC](#) (Dominance, Influence, Steadiness and Conscientiousness) and the strength finder evaluation in "[Now Discover Your Strengths](#)".

**Tip 1:**

Some of these cost quite a lot of money, however considering the importance of what you're doing, it is probably worth investing in them if you haven't already done so.

**Tip 2:**

It can be hard initially to see how to apply these tests. One trick is to turn things around, and as you identify possible careers, think about what personality type is most likely to be successful in these careers. Is there a match or a mismatch? We'll do this later.

**Tip 3:**

Treat these tests as advisory only - you can't capture the whole complexity of your personality and experience with only a few questions. That said, you'll probably find the tests quite insightful!

With personality testing you learn what you have in common with other people. You also discover potential points of friction with people of other personality types. While no personality type is good or bad, it does help you discover what motivates and energizes you. This in turn empowers you to seek those elements in the work you choose to do, and avoid the things that frustrate and demotivate you.

As you explore your personality you come to realize that who you are is really determined by the choices you make. You choose to react one way over another, or to prefer one thing to another. You can take this self-awareness one step further by examining why you make the choices you do. In psychological terms, what is your payoff for making the choices you make?

When you know the "why" it is easier to see *how* you can become fulfilled through the work you do.

**Write a "Who I Am" Statement**

Now draw this together into a simple written statement of who you are. This is an important step toward self-discovery and defining your purpose. Use it to answer the following questions:

- What your talents and strengths are.
- The talents you achieve most with.
- The activities you get most satisfaction from.
- The type of activity the psychometrics you've completed guide you towards.

**Tip:**

When you're doing this, be careful not just to look back nostalgically at simple jobs where you performed well - after all, many different people could perform well in these situations, and this gives you little information.

Focus instead on more difficult areas where you made a positive difference, and where others didn't.

**2. Finding Out What You Want to Do**

Now that you know who you are, the next stage is to think about what you want to do.

For your life to be balanced and fulfilled, your career must be aligned with who you are: Otherwise you'll be unhappy with work, and you'll probably underachieve. After all, ill-fitting jobs demand



different talents from the ones that you have. If you try to pursue a career path that is at odds with your values, your beliefs, and your way of seeing the world, then you'll struggle constantly and be under a great deal of stress and pressure.

The starting point is to do some [brainstorming](#) on the jobs that you think would suit who you are. We'll then confirm this with some different psychometric tests, and then extend this list with some more brainstorming.

You then need to spend some time researching the top careers you've identified.

### **i. Exploring the Options You Know About**

Starting with your "Who I Am" statement, start thinking about all of the jobs *you can see* that would suit you *someone with the talents and interests in that statement* (by depersonalizing it in this way, you help to avoid "being too close to the issue.")

Starting here is particularly important if you're already established in a career: It's important to capitalize where you can on the experience and contacts you've already built up, compared with ditching everything and starting completely afresh (while this sounds glamorous and enticing, it puts you in the position of competing equally with other career starters, who may be much younger than you. On the other hand, if you're profoundly unhappy with your company, industry and profession, a radical career change may be the best thing...)

So start by asking yourself if your current role can be adapted to suit you much better; if there are other roles within your existing company that would be worth trying; or whether similar roles in other organizations might be more rewarding.

Once you've done this, extend out and [brainstorm](#) the other options available.

### **ii. Using Career Tests**

The next stage is to use online career tests to explore options that you might have missed.

Useful ones are:

Free, but limited career selection advice:

[Princeton Review Career Quiz](#)

Chargeable (but inexpensive, and with good selections of possible careers):

<http://www.self-directed-search.com>

<http://www.assessment.com>

### **iii. Thinking Further**

The unavoidable flaw with these career tests is that they're based on backward-looking data, and can only cope with the major career types. Because of this, they can't recommend new careers, nor do they know about less well-known careers.

Using the test results as a starting point, do some brainstorming to see if there are new technology careers which demand similar personality types, or if there are more obscure careers that may also be open.

#### iv. Pulling This Together.

You'll now have identified a wide range of possible careers open to you. Now's the time to cut these down and prioritize them. We're not asking you to choose one now, but to cut down to your top 5 or 6 choices (the reason being that when you start researching these careers, some of them may turn out to be quite bad!)

Again, if you're having trouble prioritizing, use paired comparison analysis to rank your choices.

#### v. Perform Career Research

Armed with a solid understanding of how you can participate in fulfilling work, you now need to research the various options you have to make money doing so. Career research is not something many people relish, but it is necessary in order to eliminate choices that seem to be great fits on the surface but really won't align with your mission and purpose.

Yes, this is quite tedious. But think about the consequences of getting things wrong! Surely it's worth spending time exploring your options, rather than a lifetime kicking yourself for making a bad choice!

Methods for researching careers include:

- Researching the career using sites like [Acinet.org](http://Acinet.org), so that you can understand industry trends, job pay levels, qualifications needed, job availability, etc.
- Conducting your own [PEST Analysis](#) to confirm your own view of likely career trends.
- Reading industry/career magazines and get a sense of how "happy" the industry is, who the major players in it are, and what the issues and problems within it are. Also, looking at job vacancies to see if the career is in demand.
- Understanding what talents and personalities make people successful in the career, and mapping these back against your own talents and personality.
- Attending professional and trade shows.
- Participating in job fairs.
- Visiting company websites, and keep an eye on how companies are talked about in the press.
- Understanding where organizations are based, and deciding if you're prepared to travel to interviews, and perhaps to move.
- Volunteering.
- Working part time and/or seasonally in the industry.

**Tip:**

Be careful when using career trends to identify career possibilities: The desire to pursue an up and coming career may overshadow your mission and purpose. This will only lead to dissatisfaction down the road.

Also be aware that there's a natural desire from people within an industry to inflate its prospects (to ensure a good supply of new recruits in the future.) Take official figures with a pinch of salt!

By the end of all of this research, you may have rejected several possible careers. Now's the time to narrow down to one! Again, Paired Comparison Analysis may be useful here, however so can [Grid Analysis](#) which helps you make comparisons where many variables are involved.

### 3. Answering "How do I Get Hired?"

In this last phase you answer, "What am I going to do to get hired?"

With your "Who I Am" statement and your research as your compass, now you need to actually map your progress. Many people tend to move from their purpose right into job search mode. This is a mistake because unless you have a plan, it is far too easy to get derailed by a lucrative job offer, an opening that Uncle Vinny has, a job that sounds really glamorous, or a whole host of other distractions.

Develop your plan first and you're more likely to get where you want to go, faster.

- Start by writing down the career you want. What is your long-term vision for yourself in terms of your career?
- Write down the steps you need to take or the things you need to accomplish, in order to get there. What qualifications should you get? What experience should you build? Which organization will give you the best start?
- For each of these steps create a detailed implementation plan.
  - These are your short term goals
  - Be sure to express as SMART objectives
- Go back and identify contingency plans
  - Do a "what if" analysis on your goals "If you don't get accepted to grad school this year, what will you do?"

**Tip:**

The more contingency plans you have the more likely you will be able to survive the inevitable setbacks. You will also have much more confidence in yourself despite the bumps in the road.

**Tip 2:**

Recognize that the more opportunities you have, the better the job that you'll be able to choose. Concentrate on creating as many opportunities as possible!

Now you are free to pursue your dream career with confidence. There are certainly no guarantees but with the right amount of planning and a sufficient dose of reality, the career that you are meant for will materialize.

**Signs a career direction evaluation may be in order:**

- Your job lacks challenge and excitement for you.
- You are feeling unappreciated.
- Your promotional and/or development opportunities are limited.
- You are no longer having fun.
- Learning is replaced with routine.
- You sense that your skills and talents are being wasted.
- You are suffering from stress or depression.

**Key Points**

Finding career direction is a process. The more effort you put into the planning stages the better your results. Uncovering your true self and your purpose is heavy, emotional work and you may have to go through this process a few times in the span of your working life. The effort however, is certainly worth it when you end up with a clear sense of the direction your career should be taking.

## 10.2 Creating Job Satisfaction

### Getting the most from your job

"Find a job you like, and you add five days to every week."  
*H. Jackson Brown, Jr.*

For many of us, the idea of having a job that is truly satisfying - the kind where work doesn't feel like work anymore - is pure fantasy. Sure, professional athletes, ski patrollers, and golf pros may have found a way of doing what they love and getting paid for it. But is there actually anyone out there who dreams of sitting at a desk and processing paper, or watching products fly by them on conveyor belts, or working to solve other people's problems?

Career dreams are one thing; practical reality is often another. When they happily coincide, seize the opportunity and enjoy it! Luckily, when they do not, it's good to know that it **is possible** to get job satisfaction from a practical choice of career. Job satisfaction doesn't have to mean pursuing the ultra-glamorous or making money from your hobby. You can **work at** job satisfaction, and find it in the most unexpected places.

The heart of job satisfaction is in your attitude and expectations; it's more about how you approach your job than the actual duties you perform. Whether you work on the farm, a production line, in the corner office or on the basketball court, the secret is to understand the key ingredients of **your unique recipe** for job satisfaction.

#### Identify Your Satisfaction Triggers

There are three basic approaches to work: is it a job, a career, or a passion? Depending on which type of work you are in right now, the things that give you satisfaction will vary.

- If you work at a **JOB**, the compensation aspects of the position will probably hold more appeal than anything else, and have the greatest impact on whether you stay or go.
- If you work at a **CAREER**, you are looking for promotions and career development opportunities. Your overall satisfaction is typically linked with your status, power, or position.
- If you work at a **PASSION**, the work itself is the factor that determines your satisfaction, regardless of money, prestige, or control.

Inevitably, these are generalizations, and you will probably find that you get satisfaction from more than one approach to work. Being aware of the type of work you are doing, and the things you need for job satisfaction, will help you to identify and adjust your satisfaction expectations accordingly.

#### Building Job Satisfaction

Once you have identified the blend of status, power, or intrinsic enjoyment that need to be present in your work for you to feel satisfied, you then need to work on some of our seven 'ingredients' for a satisfying job. These ingredients are:

- Self-awareness
- Challenge
- Variety
- Positive attitude
- Knowing your options
- Balanced lifestyle
- A sense of purpose

## Self-Awareness

The first step in the search for job satisfaction is to know yourself. If you're to be happy and successful, you need to understand your strengths and weaknesses. This will help you identify what types of profession will allow you to build on those strengths, and minimize those weaknesses. A useful framework for conducting this type of analysis is a [Personal SWOT analysis](#).

It is difficult to feel satisfied with something you aren't very good at, so rather than spend time beating yourself up about it, take a long hard look at the things at which you excel, and try to find a position that uses some of those skills too.

Another important component of self-awareness is to have a good understanding of your personality traits and your preferred style of working. A useful tool for this is [Schein's Career Anchors](#), which helps you understand what you value and what motivates you in your career, (and also what you **do not** value, and what **de**-motivates you).

For more information on some of the most commonly used personality and behavioral typologies, the MindTools site has articles on [Myers Briggs](#) and [Holland's Codes](#). These also provide links to assessment tools such as the [MAPP assessment](#) as well as a suite of assessment tools at [Analyze My Career](#).

By increasing your self-awareness, you can work towards the ideal blend of compensation, status, and intrinsic reward that suits you, and that you can realistically achieve. Knowing this will help you to set appropriate goals, and manage your own expectations.

The greater the match between your preferences and the requirements of the job, the more *potential* for job satisfaction you have. The remaining six 'ingredients' determine how much of that potential you actually achieve.

## Challenge

Some days you may deny it, but we all thrive on interesting challenges. Does this mean your job has to be the head of engineering at NASA? No, different things challenge different people at different times. You just need to figure out what you can do to make sure you don't allow yourself to go stale at work.

Even if the job itself is not all that challenging, you can make it challenging. Some great ideas here include:

- Set performance standards for yourself - aim to beat your previous record, or set up a friendly competition among co-workers.
- Teach others your skills - nothing is more challenging, or rewarding, than passing your skills and knowledge on to others.
- Ask for new responsibilities - these will give you opportunities to stretch yourself.
- Start or take on a project that uses skills you would like to use, or want to improve.
- Commit to professional development - take courses, read books or trade magazines and attend seminars. However you do it, keep your skills fresh and current.

## Variety

Closely related to the need for challenge is the need to minimize boredom. Boredom is a common culprit when it comes to job dissatisfaction. When your mind is bored you lack interest and enthusiasm and even a well-matched job becomes dissatisfying. Some common methods to alleviate boredom at work include:

- Cross train and learn new skills.
- Ask to be moved to a new assignment or department requiring the same skills.
- Ask to work a different shift.

Volunteer to take on new tasks.

- Get involved with committee work.
- Go on an extended leave, or take a sabbatical.

**Tip 1:**

If your job is inherently repetitive then add variety by changing your routine. Instead of sitting in the lunchroom for your break, go outside, or reposition your desk so you have different scenery.

**Tip 2:**

All jobs have elements or tasks that are boring, and if you're to do your job well, you'll need to do these tasks well (you can bet there are things even your CEO doesn't like doing!) However, make sure there's plenty of interesting work to offset the boredom.

**Positive Attitude**

Attitude plays a huge role in how you perceive your job and your life in general. If you are depressed, angry or frustrated, you're much less likely to be satisfied with anything. Making a change to a positive attitude is a complex process that requires a lot of work and a strong commitment. However, over time, you can turn your internal dialogues around and start to see most events in your life as positive and worthwhile. Here are some tips:

- Stop negative thoughts from entering your brain.
- Reframe your thoughts to the positive.
- Put the events of the day in the correct context.
- Don't dwell on setbacks.
- Commit to viewing obstacles as challenges.
- Accept that mistakes are simply opportunities to learn.
- Become an [optimist](#).

To help you with your quest to become positive, MindTools has a useful article titled [Rational Positive Thinking](#), which helps you to identify and change negative and unhappy thinking patterns

**Know Your Options**

When you feel trapped, you can start to get anxious. At first you wonder what else is out there for you. This progresses to the point where you become convinced that anything other than the job you're doing has got to be more satisfying. To combat this, continuously scan your environment for opportunities. When you feel you have options, you have more control. When you make a positive choice to stay with a job, that job has much more appeal than if you feel forced to stay because you feel you have no alternative.

- Keep a list of your accomplishments.
- Update your resume on a regular basis.
- Keep up to date on employment trends.
- Research other jobs that interest you.
- Adopt an 'I'm keeping my options open' approach.

### **Maintain a Balanced Lifestyle**

You'll have heard many times that you need to keep your life and work in balance. When you focus too much on one at the expense of the other you risk putting your whole system in distress. When work takes over your life, it is easy to resent it and lose your sense of perspective: Suddenly everything about your life is clouded with negativity.

The [Life Career Rainbow](#) and [The Wheel of Life](#) are two great tools to use when seeking to attain and maintain an appropriate work life balance.

### **Find a Sense of Purpose**

Last, but certainly not least (for many people) is the need to find a sense of purpose in the things you do. Even if you have a boring job, it helps a lot if you can see the real benefit you're providing for people.

Even the most mundane job usually has purpose if you dig deep enough. And if it doesn't, should you be wasting your life doing it?

If you're struggling to see the value in what you do (or if you want to sharpen your image of it) see our article on mission statements and vision statements: [Unleashing the Power of Purpose](#).

### **Key Points**

Work plays a significant role in our lives. In our quest to be happy and productive, having a strong sense of job satisfaction is important. When you are dissatisfied with your job, this tends to have an influence on your overall outlook on life. While you may not be in the career of your dreams right now, it is still your responsibility to make sure that what you are doing is satisfying to you.

By knowing the key elements that go into job satisfaction, you can choose to take control and make the changes you need to feel really satisfied and motivated by what you do. Make one small change at work today that makes you feel good or different - build on that change and create a satisfying environment for yourself.

## **10.3 Using "Holland's Codes"** **Shaping a career that suits your personality.**

You know when you are in a job you like. You also know when the task you're doing just isn't right for you.

What lies behind our feelings of work satisfaction or dissatisfaction are our fundamental work interests: These are the things that we enjoy doing, whatever the industry or the job title. The trick to finding career satisfaction can be to identify those core interests and match your job to them.

For example, if you're a science person, you may not be happy working in a job that needs quick decisions, or where you need to use your "gut" to guide you. Likewise, artistic people would be driven mad in a profession that has lots of rules and procedures, or which demands a lot of number crunching.

In a perfect world, we would all choose careers that suit our core interests. However this is not a perfect world: For all sorts of reasons, we can find ourselves in positions where what we're doing just doesn't suit our natural interests and abilities. This is where understanding how job and personality fit together can help you change the situation for the better.



Ability and personality are the two main things contribute towards job satisfaction. You're likely to find that jobs that suit your ability and personality are much more rewarding than those that don't. Here we look at your work interests – an important part of your work personality.

### Understanding the Theory: Holland's Codes

In the 1970s John Holland developed a popular theory of interest development based around these six personality types:

#### 1. Realistic (R):

These are people who like well-ordered activities, or enjoy working with objects, tools, and machines.

Realistic people:

- See themselves as mechanically or athletically talented, but may not be good with people.
- Value concrete and tangible things like - money, power, and status.
- Avoid "social" activities, those that need interaction with other people.

Common traits:

Hard-headed, inflexible, persistent, materialistic, practical, and genuine.

#### 2. Investigative (I):

Investigative people like activities that involve creative investigation of the world or nature.

Investigative people:

- See themselves as highly intelligent, but often lack leadership skills.
- Value scientific endeavors.
- Avoid activities that seem mundane, commercial or "enterprising".

Common traits:

Analytical, curious, pessimistic, intellectual, precise, and reserved.

#### 3. Artistic (A):

Artistic people like unstructured activities, and enjoy using materials to create art.

Artistic people:

- See themselves as talented artists.
- Value aesthetics.
- Avoid "conventional" occupations or situations.

Common traits:

Idealistic, complicated, introspective, sensitive, impractical and nonconformist.

#### 4. Social (S):

Social people enjoy informing, training, developing, curing and enlightening others.

Social people:

- Perceive themselves as helpful, understanding and able to teach others.
- Value social activities.
- Avoid activities demanded by "realistic" occupations and situations.

Common traits:

Generous, patient, emphatic, tactful, persuasive, and cooperative.

### **5. Enterprising (E):**

These people enjoy reaching organizational goals or achieving economic gain.

Enterprising people:

- See themselves as aggressive, popular, great leaders and speakers, but may lack scientific ability.
- Value political and economic achievement.
- Avoid activities demanded by "investigative" occupations and situations.

Common traits:

Extroverted, adventurous, optimistic, ambitious, sociable, and exhibitionistic.

### **6. Conventional (C):**

Conventional people enjoy manipulating data, record keeping, filing, reproducing materials, and organizing written or numerical data.

Conventional people

- See themselves as having clerical and numerical ability
- Value business and economic achievement
- Avoid unstructured or "artistic" activities

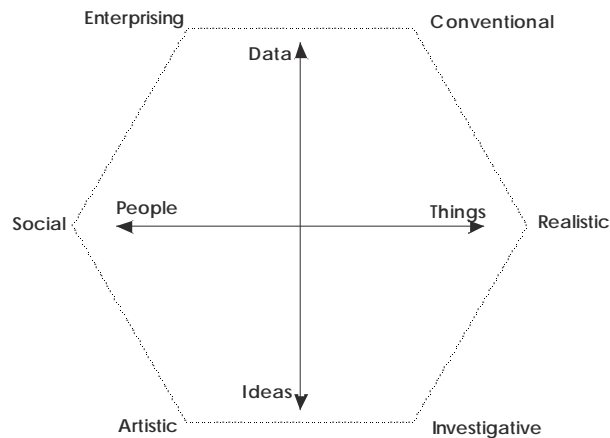
Common traits:

Efficient, practical, conscientious, inflexible, defensive, and methodical.

## **The Model**

Holland then arranged these six personality types into a hexagon (see figure 1, below) organized according to people's preference for working with different stimuli at work: people, data, things, and ideas. Holland's theory is that people with different personality types prefer working with different work stimuli, and that the distance between work personalities indicates the degree of difference in interests between them. For example Artistic people are least like Conventional people and most like Social and Investigative people.

Figure 1: Holland's Codes



Holland's conclusion was that for any personality type, the career most aligned with that type is most likely to be enjoyable and satisfying. For example, a Realistic person would be best suited for a Technical job and least suited for Social job. Jobs with Conventional or Operational characteristics would be the next best choices.

The way that this works in practice is that people use a personality test to identify their three top personality types. This gives their Holland's code (for example, ESA). This is then matched against the Holland's codes of people typically found within particular careers.

### How to Use Holland Codes Career Model:

There are two good ways of using this model - either in helping you choose a career that suits you, or in helping you shape your existing job so that you maximize your fulfillment. To find your ideal career according to this approach, just complete steps i and ii below. To shape your job, use our complete process.

Using Holland's Codes is a straightforward process, which is made all the easier by some useful online interest evaluation sites.

#### Part One: Identify your Work Personality

**Step i:** Read through the brief descriptions given above and find the one you most identify with. You may want to take an official Holland Code Assessment. There are many of these, costing different amounts - you can find them by typing "Holland Code Assessment" into Google.

Try one: Does the assessment say what you thought it would? If they aren't, ask yourself why: Often we choose a personality type that reflects who we want to be, not who we really are. (If so, learn from this!)

#### Tip 1:

Do try the online tests - they're not expensive (for example, one costs US\$9.99) and a good one will show you the careers and professions that most suit your code once you've completed it. This can save you a huge amount of painstaking research!

**Step ii:** To further explore your "true" work personality, ask yourself, "How would my spouse, family, and friends categorize me?" Show some of your friends and co-workers descriptions of the

types and ask them to categorize you. Here again, explore any differences between your assessment of yourself and theirs.

### **Part Two: Analyze your job in terms of your interests**

**Step iii:** Look at your main tasks and responsibilities. Are they aligned with your work personality?

**Step iv:** List those responsibilities that are aligned in one column and those that are not in another. Use this to decide whether your job is a good fit for your interests or not.

**Step v:** For each of the job roles where your interests are not well matched, work out at least one way of bringing the two sides together. For instance, if you are a "Conventional" person working in an administrative position, many of your roles will be in-line with your interests. However, if you were asked to organize the Christmas party, you might be very uncomfortable about deciding about decorations, entertainment, and so on. These are more Artistic responsibilities, which are directly opposite to your Conventional ways. One strategy to deal with this is to delegate the Artistic tasks and assume responsibility for making sure the tasks get done. You maintain the Administrative duties and get rid of the Artistic ones.

### **Part Three: Set Goals to Bring Your Interests and Responsibilities in line**

**Step vi:** The best way of making sure that something gets done is to set a specific, time limited goal. Identify two or three of the most important problem areas, and set realistic goals to change things.

#### **Tip 2:**

Remember that this is a model - it's a useful way of looking at things, but it can't possibly capture all of the complexities of the ways that people behave at work. Make sure that you interpret any conclusions with common sense.

#### **Tip 3:**

Also bear in mind that as you develop in your career you'll need to extend your skills into new areas. In particular, as you take responsibility for people and then move upwards within an organization, you need to develop the "Social" ability to work with other people, as well as other skills that normally go with other personality types (if you're going to be a CEO, there's a lot of "Conventional" work that you just have to do, and do well.)

### **Key Points**

Holland's Career Codes provides a useful framework for exploring your personal interests and the careers most likely to suit you.

Every occupation requires a particular set of characteristics. By identifying your particular interests you can quickly uncover the parts of your job that give your satisfaction. Likewise, you can identify areas of dissatisfaction and help you plan how to address these. This helps you develop your career in the right direction – one that will be a source of long-term fulfillment.

## 10.4 Personal SWOT Analysis

### Making the most of your talents and opportunities

*"Chance favors the prepared mind."*

– Louis Pasteur

You are most likely to succeed in life if you use your talents to their fullest extent. Similarly, you'll suffer fewer problems if you know what your weaknesses are, and if you manage these weaknesses so that they don't matter in the work you do.

So how do you go about identifying these strengths and weaknesses, and analyzing the opportunities and threats that flow from them? SWOT Analysis is a useful technique that helps you do this.

What makes SWOT especially powerful is that, with a little thought, it can help you uncover opportunities that you would not otherwise have spotted. And by understanding your weaknesses, you can manage and eliminate threats that might otherwise hurt your ability to move forward.

If you look at yourself using the SWOT framework, you can start to separate yourself from your peers, and further develop the specialized talents and abilities you need to advance your career.

#### How to Use the Tool

To perform SWOT analysis, print out our free [worksheet](#), and write down answers to the questions in each area below.

#### Strengths

- What advantages do you have that others don't have (for example, skills, certifications, education, or connections)?
- What do you do better than anyone else?
- What personal resources can you access?
- What do other people (and your boss, in particular) see as your strengths?
- Which of your achievements are you most proud of?
- What values do you believe in that others fail to exhibit?
- Are you part of a network that no one else is involved in? If so, what connections do you have with influential people?

Consider this from your own perspective, and from the point of view of the people around you. And don't be modest or shy – be as objective as you can.

And if you have any difficulty with this, write down a list of your personal characteristics. Some of these will hopefully be strengths! You can also learn more about identifying your strengths in our article on "[Your Reflected Best Self™](#)".

#### Tip:

Think about your strengths in relation to the people around you. For example, if you're a great mathematician and the people around you are also great at math, then this is not likely to be a strength in your current role – it may be a necessity.

#### Weaknesses

- What tasks do you usually avoid because you don't feel confident doing them?

- What will the people around you see as your weaknesses?
- Are you completely confident in your education and skills training? If not, where are you weakest?
- What are your negative work habits (for example, are you often late, are you disorganized, do you have a short temper, or are you poor at handling stress?)
- Do you have personality traits that hold you back in your field? For instance, if you have to conduct meetings on a regular basis, a fear of public speaking would be a major weakness.

Again, consider this from a personal/internal perspective and an external perspective. Do other people see weaknesses that you don't see? Do co-workers consistently outperform you in key areas? Be realistic – it's best to face any unpleasant truths as soon as possible.

### **Opportunities**

- What new technology can help you? Or can you get help from others or from people via the Internet?
- Is your industry growing? If so, how can you take advantage of the current market?
- Do you have a network of strategic contacts to help you, or offer good advice?
- What trends (management or otherwise) do you see in your company, and how can you take advantage of them?
- Are any of your competitors failing to do something important? If so, can you take advantage of their mistakes?
- Is there a need in your company or industry that no one is filling?
- Do your customers or vendors complain about something in your company? If so, could you create an opportunity by offering a solution?

You might find useful opportunities in the following:

- Networking events, educational classes, or conferences.
- A colleague going on an extended leave. Could you take on some of this person's projects to gain experience?
- A new role or project that forces you to learn new skills, like public speaking or international relations.
- A company expansion or acquisition. Do you have specific skills (like a second language) that could help with the process?

Also, importantly, look at your strengths, and ask yourself whether these open up any opportunities – and look at your weaknesses, and ask yourself whether you could open up opportunities by eliminating those weaknesses.

### **Threats**

- What obstacles do you currently face at work?
- Are any of your colleagues competing with you for projects or roles?
- Is your job (or the demand for the things you do) changing?
- Does changing technology threaten your position?
- Could any of your weaknesses lead to threats?

Performing this analysis will often provide key information – it can point out what needs to be done and put problems into perspective.

## A Personal SWOT Example

What would a personal SWOT assessment look like? Review this SWOT analysis for Carol, an advertising manager.

### Strengths

- I'm very creative. I often impressing clients with a new perspective on their brands.
- I communicate well with my clients and team.
- I have the ability to ask key questions to find just the right marketing angle.
- I'm completely committed to the success of a client's brand.

### Weaknesses

- I have a strong, compulsive need to do things quickly and remove them from my "to do" list, and sometimes the quality of my work suffers as a result.
- This same need to get things done also causes me stress when I have too many tasks.
- I get nervous when presenting ideas to clients, and this fear of public speaking often takes the passion out of my presentations.

### Opportunities

- One of our major competitors has developed a reputation for treating their smaller clients poorly.
- I'm attending a major marketing conference next month. This will allow for strategic networking, and also offer some great training seminars.
- Our art director will go on maternity leave soon. Covering her duties while she's away would be a great career development opportunity for me.

### Threats

- Simon, one of my colleagues, is a much stronger speaker than I am, and he's competing with me for the art director position.
- Due to recent staff shortages, I'm often overworked, and this negatively impacts my creativity.
- The current economic climate has resulted in slow growth for the marketing industry. Many firms have laid off staff members, and our company is considering further cutbacks.

As a result of performing this analysis, Carol takes the bold step of approaching her colleague Simon about the art director's maternity leave. Carol proposes that both she and Simon cover the job's duties, working together and each using his or her strengths. To her surprise, Simon likes the idea. He knows he presents very well, but he admits that he's usually impressed by Carol's creative ideas, which he feels are far better than most of his.

By working as a team, they have a chance to make their smaller clients feel even better about the service they're getting. This takes advantage of their competitor's weakness in this area.

### Key Points

A SWOT matrix is a framework for analyzing your strengths and weaknesses as well as the opportunities and threats that you face. This helps you focus on your strengths, minimize your weaknesses, and take the greatest possible advantage of opportunities available to you.



## 10.5 Job Crafting

### Shaping your job to fit you better

Have you ever noticed something like this going on at work? It's now about six months since the arrival of a new Program Office Administrator, and the focus of the job has changed subtly.

The previous post-holder, Rebecca, did a great job, using her competence in finance to develop new procedures for checking the monthly financial reports for all of the projects in the program. Her successor, Stephen, however, has a particular flair for graphic design. He's now enhancing the different progress reports to make key information stand out more effectively. Overall, though, they've both been really good performers, making a big contribution to the efficiency and organization of the team.

So, what's going on? The answer is that both Rebecca and Stephen have been using the concept of job crafting. The idea here is that many jobs are actually quite flexible, meaning that their focus can be adjusted to fit the skills and preferences of the current job-holder. By subtly redesigning your job like this, you can play to your strengths, improving both satisfaction and performance. You shift the emphasis of the job towards things that you can do really well, and away from those where your performance is likely to be weaker.

Job crafting may seem like a simple idea, but what makes it a really powerful tool is that it allows you to increase the control you have over your own professional life, while "wowing" your employer at the same time. Practically any job can be crafted, at least to some extent, and you can start whenever you want, without necessarily consulting managers or having to wait for their approval.

#### How to start crafting your job today

To "craft your job", follow these steps:

1. Decide what you want to change.
2. Evaluate how the change will impact you and your work environment.
3. Act to put positive change in place.
4. Check on progress, adjust and continue.

Let's look at each of these steps in more detail.

#### Step 1: Decide what you want to change by crafting your job

You can make changes in one or more of the following areas to craft the way you work, so that it's closer to your "ideal" job.

- **Task content:** This involves improving the way that things are done, using skills that you already have; or using your knowledge to change working methods, so that you can generate better results. The ways that Rebecca and Stephen crafted their work as Program Office Administrators fell into this category.

In short, it's about creating opportunities to play to your strengths. (If you're not sure what your strengths are, use the [Reflected Best Self™](#) exercise to explore them.)

- **Relationships:** Here, you might look for ways to have more satisfying interactions with other people during the course of your work each day. In our example, Stephen might volunteer to mentor new hires.

- **Purpose:** You can also redefine your existing work to reflect what you see as being the real impact of what you do at work. For example, a programmer working in the IT department of an airline could reframe his or her work from "writing code" to "helping people enjoy trouble-free travel". For more on this, read our article on [Creating Job Satisfaction](#).

**Note:** Crafting job purpose doesn't involve any actual changes in the content of your work, and while this can certainly add to your enjoyment of your work, it won't help you to expand your skills or affect your output greatly. So look for things you could change in the first two categories to get the most out of job crafting.

## Step 2: Evaluate how crafting your job will impact you and your environment

Next, you need to assess the potential impact of these possible changes on your wider work environment. Here, you should take into account your clients, your colleagues, your supervisor or manager, and the organization as a whole.

Remember that effective job crafting usually depends on finding a win-win solution. For example, you may have significant experience in using your organization's internal accounting system. You could volunteer to train new-hires on the system, or provide updates on system changes for your colleagues. What **you** get out this could be simple enjoyment because you enjoy teaching people things, or a boost to your own self-esteem, or more interaction with people from other departments. What your **organization** gets from this is a better-trained, more effective workforce.

Avoid any temptation to turn a job crafting exercise into a win-lose situation. For example, if you dislike having meetings with your supervisor, you might be tempted to craft your job so that you spend more time in the test lab, where she's less likely to find you! You might achieve your short-term goal of avoiding these meetings, but the overall impact may well be negative.

So make sure you're headed for a mutually beneficial outcome, or at least that your job crafting is compatible with your work environment. If this isn't the case, go back to **Step 1**, and see if other job crafting changes might work better!

Also, if you have any managerial responsibilities, you need to take them into account when you consider any job crafting. When you have a number of other people to supervise, even small changes in how you work can have significant effects on the people who depend on you.

## Step 3: Act to put positive job crafting change in place

At this stage, the key is to get rid of any symptom of what psychologists call "learned helplessness". This is the phenomenon whereby people have become so accustomed to indifference to their contributions that they believe that no matter what they do, nothing will come of it.

Job crafting gives you the chance to turn this situation around. By refocusing your job in this way, **you** decide what's going to make you feel better valued and more productive, and **you** decide to make the necessary changes. The only condition is that your decisions must have positive outcomes for your organization, as mentioned in Step 2.

## Step 4: Check on your job crafting progress, adjust and continue

Having gone through Steps 1, 2 and 3 above, it's time to put your job crafting into practice, check that it gives you what you want; ensure that your boss and clients are happy with what's going on; and make sure that it really is compatible with your wider work environment. If everything checks out, and you feel good about what's happening, you can let your changes become a habit.

## What job crafting can do for you

The benefits of job crafting can include:

- Giving you greater enjoyment from what you do at work.
- Helping you approach your work with more energy and enthusiasm.
- Encouraging real personal development by improving skills.

And of course, perfecting the skill of job crafting can, in itself, lead to career enhancement

**Tip 1:**

You can always ask your manager's opinion about how you're crafting your job. But don't wait for, or expect, managerial input or approval before you start. In job crafting, you take the initiative!

**Tip 2:**

Don't expect to be able to redefine your job completely. After all, your employer wanted someone to carry out your duties, and you accepted that when you were hired! Make absolutely sure that, within your recrafted job, you're fully meeting the objectives you've been set.

**Tip 3:**

For pointers on how you might set about job crafting, compare notes with other colleagues who are appreciated at work and who clearly enjoy their jobs. By categorizing their experiences according to the list in Step 1, you may uncover some interesting ideas, and so find out what might also work for you.

opportunities.

## Key Points

Job crafting is something that you decide to do, in order to change aspects of your current job, so that it suits you better. There are four basic steps: you decide what you want to change, you look for a win-win solution, you put the changes into practice, and then, having checked they're having a positive effect, you make sure they become a habit.

An important element of successful job crafting is that it's you who takes the initiative: you don't need to wait for your manager or supervisor to give you instructions. The benefits you can get from crafting your job include boosting results, increasing enjoyment, building skills and increasing your general ability to cope with your work. Start crafting today!

The Center for Positive Organizational Scholarship (POS) at the University of Michigan has a useful [Job Crafting Exercise](#). This is a template that you can buy on-line to help you apply the ideas discussed here.

## 10.6 Future Proof Your Career

### Developing skills for your future as well as for today

How will your job be different five years from now? Indeed, will your job even exist in its present form in five years, or in 10 or even 20 years time? And over this time, what will happen to the company and industry you work for?

We really don't know what the future holds. What we do know for certain is that change is a constant in the workplace. This means that what we are doing now will be different in the future.

How can you predict and prepare for this workplace of the future? What should you be doing now to make sure you don't find yourself facing a dead end in your career?

This article gives you some strategies you can begin pursuing now. They will help you keep your skills current and your opportunities open. Pick and choose from among them to build your unique Future Proofing Kit. And remember, as your own circumstances change, your kit may need to adapt as well. Refer back to this list often and take inventory of what you should be doing either differently from, or in addition to, what you are doing now.

### Future Proofing Kit

**Find an "Academy" company.** If you're early in your career, get a job at a company renowned in its industry for developing its people (traditional examples are GE, Toyota and Mars.) When you work for this kind of company, you are enrolled in a continuous development program that goes well beyond the technical skills you need for your current role. This forms a great foundation for a successful career.

**Get and remain tech-savvy.** Much of the change we see has to do with new technology. We keep finding faster and leaner ways to do things. Force yourself to keep your technical skills current, even if new developments don't seem directly related to your current job. Otherwise, you'll get left behind and may have to catch up a huge amount before you can head off in a new direction in the future. If that means learning the newest online tools like blogging and web conferencing, do it. If you're in a highly technical field of work, be proactive and stay current - even when your company does not.

**Develop your competencies, skills and experience.** Along with technical skills, it is critically important to continue your professional development, so that you remain in demand in the marketplace. You need to develop the transferable skills that are universally sought by employers. Leadership, communication, innovation, stress management and interpersonal skills are all fundamental requirements of the jobs of today and tomorrow. Here are some ways to do this:

- Choose two competencies or skills to improve each year. Monitor and track your progress.
- Develop a five year learning plan to acquire the knowledge and education you need.
- Develop cross-functional skills. Beyond a certain stage in your career and in uncertain environments, specialization is no longer the route of choice. It can pay off for some; however, it has high risk of obsolescence attached.
- And yes, consider joining our [Career Excellence Club](#) to learn these skills.

Your specific technical skills may get out of date. That's why you see nurses with business skills and technology experts with financial experience. A broad range of competencies, skills and abilities can help you secure a new job or may even open the door to working in a new industry.

To maximize your chances of success, use the tips found in the [Personal Goal Setting](#) article to help you set development goals effectively, and if you have our [Personal Development Plan Workbook](#), make sure you use it to plan your skills development.

**"Think global."** In many industries, geographical barriers to business are getting less and less relevant. Your co-workers, clients and stakeholders now and in the future can be from anywhere in the world. You need to acquire the ability to work within the international marketplace by:

- Learning about working with diverse cultures.
- Asking for assignments that require international exposure.
- Learning another language.

The more experience you get, the more confidence you will have when working in the global marketplace. This will make you much more attractive to employers in the future.

**Create and maintain a success journal.** The time to start thinking about your accomplishments and skills is not when you are looking for a new job. You need to be proactive and take continuous inventory of what you do really well, the accolades you have been given and the noteworthy results you've been responsible for. Employers want to know what you will do for them. When you have a ready list of things you have done, it is much easier to recall your most relevant achievements and skills.

- Track your duties, projects and results.
- Keep a list of professional development activities you've participated in.
- List the training you've completed.
- Note your volunteer work.
- File your performance reviews and the written letters and emails you receive that note your performance.

Use this success journal to track your strengths and successes and also to affirm your wonderful qualities as well. All of us need to boost our confidence and self esteem from time to time. Having a list of objective strengths and accomplishments can do a lot to improve your motivation and belief in your abilities.

**Build and maintain a professional network.** Make sure that you develop good relationships with people both within and outside your organization. These people will be invaluable as the landscape of work changes. They can bring you along with them as they weather changes, and can provide opportunities when your current position looks uncertain. When you add a mentor or two to your network, you have the added bonus of learning new skills, technologies and strategies that will help you move your career in the direction you want.

- Collect business cards.
- Keep track of former bosses and colleagues.
- Join professional networking associations.
- Participate in a wide range of activities and build relationships beyond your current career or industry.

**Scan the environment.** Be aware of changes and trends in the economy, your profession and the industry you are in. No one can accurately predict the future; however stay ahead of the crowd by keeping yourself informed, and choosing to work in industries - and for employers - that have long-term sustainability.

- Keep track of business trends by reading a good newspaper and the industry press.
- Complete a [PEST](#) analysis for your industry and others you are interested in.
- Analyze the attractiveness of your company using [Porter's Five Forces](#) and [USP Analysis](#).
- Back your hunches and analysis with action. If you think your company or industry is in trouble, it's best to get out while the going's good!

Overall, avoid industries and companies that are on a downward slide. Being an expert in a dying field may provide a niche strategy into the medium term; however, you will eventually have to leave. It is better to prepare now.

**Keep a clear career path open.** You may be fortunate enough to be in an organization where there's a clear and attractive career path ahead of you. For many, this will not be the case.

This may not be a problem if you're in a fast growth industry - if you're good at what you do, opportunities will most-likely appear with alarming regularity. However if you're in a slow growth industry or are one in decline, then this is a problem: There may be no onward path, and development may be blocked, however hard you work. This will lead to frustration, boredom and, in the long term, failure to achieve your potential.

This is where you need to review your options and take action to unblock your career, even if it means a job- or career-change. See our article on [Career Planning](#) to find out how to do this.

**Develop resilience.** Because the future is uncertain, you will probably encounter setbacks no matter how much you prepare and plan. People who will be successful are those with the ability to bounce back and consider such setbacks as learning experiences.

- Evaluate and affirm your strengths on a regular basis.
- Develop realistic and achievable goals, monitor your progress and identify what is holding you back.
- Build your flexibility and maintain your enthusiasm despite what is happening around you.

To learn more about resiliency, listen to the [Expert Interview](#) with [Cal Crow](#) ([Career Excellence Club](#) members only).

All of these techniques can be very useful as you begin to plan and prepare for your future. And they all have in common the elements of risk management and career planning. You need to become good at both to secure your future career.

### Key Points

While your job description may not be relevant in the future, you can ensure the skills you bring to the table are. With some forethought and planning, you can take control of your future career today. The key is not so much in how skilled you are at predicting what will happen, it is in how attuned you are to the early indications of change.

When you realize that change is constant and you are constantly planning so you stay ahead of the game, you will find yourself in a great position to recognize and capitalize on the opportunities that present themselves.

## 10.7 Overcoming a Lack of Qualifications

### Gaining the skills you need

Imagine this scenario: You're doing a great job in your current role, but you've recently become interested in a completely different line of work. This is something you feel passionate about, and it could advance your career to exciting new levels.

The only problem is that this new type of work requires qualifications or experience that you currently don't have. Sure, you've got some useful skills, and you're so inspired by the new role that you know you would quickly gain the necessary knowledge. But you fear you may not get the opportunity.

So you ask yourself: Do you really have the time or desire to quit your current job to pursue that advanced degree you need? Can you afford to spend the money or vacation time on executive-



level coaching courses? While gaining formal qualifications is the best way of advancing your career, for many people, it's not always realistic or practical to obtain those qualifications.

So, what are some alternative ways of learning the skills you need, without spending too much time and money?

The good news is that there are several ways to overcome your lack of qualifications. In this article, we offer strategies for gaining the skills necessary to help you secure the job of your dreams.

## **Volunteer**

This may come as a surprise, but volunteering isn't just about doing charity work: it's also a great way to acquire new skills that would be hard to learn elsewhere.

Let's say you've heard a rumor that a management position at your company will open up in the next few months. You've always wanted to work in management, and you'd like to apply for the job as soon as the vacancy is advertised. But you currently have no management experience. What can you do?

Well, you can show initiative, and keep an eye out for opportunities that arise in your organization - they may be advertised on a bulletin board or company intranet - even if they are not directly related to your current job. What about joining an employee relations committee? Or how about a planning committee that's organizing a major company event? Why not volunteer to run it? Taking on new duties will involve more work (and, as a volunteer, you won't get paid for it). But it's also an opportunity to be involved with managing a group of people. When it's time to apply for that management position, you'll be able to show that you have experience successfully running a team.

As well as learning new skills, volunteering for extra jobs or projects can also help you prove to your boss that you can handle increased responsibilities. Although you may not see immediate results, don't dismiss the long-term value of the knowledge you'll gain, and the good impression you'll make.

If you can't identify opportunities within your company, then consider volunteering for community organizations. Many nonprofits - such as school boards and youth work programs - look for people to do accounting, marketing, fundraising, project management, writing, budgeting, and more. These skills are highly valued in the business world, and you can add them to your résumé when you apply for a promotion or new job.

## **Start at a Lower Level**

This may not seem to make sense at first. Why would you apply for a position further down the ladder from the one you want?

Here's the reason: If you have no qualifications or experience for a specific role, then applying for a related position, with fewer responsibilities and fewer requirements, can at least lead you one step closer to the job you really want.

Imagine that you'd like to start a career as a journalist. You're a good writer, but you have no experience writing feature stories or working in a newspaper environment. Well, chances are pretty high that you won't get a writing position without a portfolio.

But if you take a job as a receptionist at a media organization, you'll soon gain detailed knowledge of how a newspaper works. You can write a few articles in your spare time, and ask your new journalist colleagues for feedback. You can even offer to help out with some of the smaller articles. The important thing is to see your name in print, and to build up your portfolio. You'll then be in



an ideal position if there's a job opening for a writer. Eventually, you could make the transition to full-time journalist.

Applying 'downward' may not seem appealing in the short term. However, in the long term, if you really want to make a career change, it may be worth exploring this option if it helps you reach your ultimate goal.

And, depending on the new company or position, you might be able to learn the skills you need for your ideal job during your regular work day. The company might offer training seminars, or reimburse you for outside classes. Failing to consider a lower-level position might mean you would miss out on these opportunities.

However, do bear in mind that certain occupations require specific qualifications and experience. For example, if you want to become a medical doctor, then just helping out on a hospital ward will not be enough to secure the job of your dreams. Several years of rigorous medical training is essential here - something you would have to consider on a practical level before making such a commitment.

### **Take Advantage of Distance Learning**

Distance learning (Internet-based classes) allows you to gain additional qualifications while working full time. This is because it's often more efficient than going to classes on campus.

With distance learning, you attend class at the time and place of your choice - on your lunch hour, in the evenings, or on weekends. You don't have to waste time driving to and from campus. And, because you work on your own (instead of at the pace of an entire class), you can often complete a qualification in less time - and at a much lower cost - than a traditional school.

Perhaps the biggest benefit to distance learning is that, because it's so common now (compared to even a few years ago), you can become certified or earn a degree in almost any area.

Skills like project management, personnel development, marketing, business management, accounting and finance, and leadership are just a few subjects you could study in a distance-learning program.

### **Take Executive-level Workshops**

Executive-level courses can help you gain qualifications in a specific area. These are usually intense training sessions that last anywhere from one day to a week or more.

Executive workshops often use several different approaches to teach upper-level managers important new skills that will help them advance their careers. For example, a traditional campus class is usually taught by one professor. Executive-level workshops, however, often use lectures from several different experts - plus group exercises and one-to-one coaching.

Imagine that you decide to take an executive workshop on relationship building, so you'll have a better chance at a career in upper management. Instead of a traditional management class, which may have only one lecture on building relationships, workshops might offer several different lectures, each exploring a different area of relationship building. You could attend lectures on topics such as Barriers to Relationship Building, Asking Questions and Telling Stories, The Cost of Building and Maintaining Relationships, and so on.

Executive-level workshops can be expensive, but they're terrific ways to learn some specific skills to add to your résumé.

If you attend a longer workshop (lasting a week, for example), you may have to use your vacation time. This is an admirable demonstration of your commitment to excel in your career, but make

sure you still have enough remaining days off to take a real vacation during the year. It's never a good idea to wear yourself out in the race to get ahead.

It's worth checking with your company when you register for a workshop. It might be willing to reimburse part of the expense, especially if you can prove that the skills you'll learn will be useful for future projects or tasks.

### Key Points

Although it can be disappointing to realize that you lack the qualifications for the job you want, you don't necessarily have to give up your dream. Where possible, work towards obtaining the formal qualifications you need to get ahead. If that's not practical, then take proactive steps to investigate other ways of learning the skills you need. You may not only impress your company with your ambition and enthusiasm, but prove to them that you really do care about the job.

Consider accepting a lower-level position to gain experience in a new field, or invest the time in distance-learning classes. This will strengthen your qualifications, and give you a chance to examine whether you really want the new job enough to work hard for it. This can often be as enlightening as the knowledge you acquire along the way.

### Apply This to Your Life

1. Consider where your next career move will be. If you're still not sure, our article on [Finding Career Direction](#) could help.
2. Is your dream job a logical next step from where you are now? Assess whether you need to acquire new skills and/or qualifications to help you make that leap.
3. If you can gain those new skills within your organization, volunteer for projects that will add those 'must-have' attributes to your résumé.
4. If you need professional qualifications to secure your ideal job, find out whether courses are available for study by distance learning.

## 10.8 Managing Your Emotions at Work

### Controlling your feelings... before they control you

*Everything can be taken from a man but the last of human freedoms – the ability to choose one's attitude in a given set of circumstances, to choose one's way.*

– Viktor Frankl, 'Man's Search for Meaning'

We've all been in one of 'those' situations before. You know... when your favorite project is cancelled after weeks of hard work; when a customer snaps at you unfairly; when your best friend (and co-worker) is laid off suddenly; or your boss assigns you more work when you're already overloaded.

In your personal life, your reaction to stressful situations like these might be to start shouting, or to go hide in a corner and feel sorry for yourself for a while. But at work, these types of behavior could seriously harm your professional reputation, as well as your productivity.

Stressful situations are all too common in a workplace that's facing budget cuts, staff layoffs, and department changes. It may become harder and harder to manage your emotions under these circumstances, but it's even more important for you to do so. After all, if management is forced into making more layoffs, they may choose to keep those who can handle their emotions, and

work well under pressure. As the above quote shows, no matter what the situation is, you're always free to choose how you react to it.

So, how can you become better at handling your emotions, and 'choosing' your reactions to bad situations? In this article, we look at the most common negative emotions experienced in the workplace – and how you can manage them productively.

Why are we focusing only on negative emotions? Well, most people don't need strategies for managing their positive emotions. After all, feelings of joy, excitement, compassion, or optimism usually don't affect others in a negative way. As long as you share positive emotions constructively and professionally, they're great to have in the workplace!

### Common Negative Emotions at Work

In 1997, Bond University professor of management Cynthia Fisher conducted a study called ['Emotions at Work: What Do People Feel, and How Should We Measure It?'](#)

According to Fisher's research, the most common negative emotions experienced in the workplace are as follows:

- Frustration/irritation.
- Worry/nervousness.
- Anger/aggravation.
- Dislike.
- Disappointment/unhappiness.

Below are different strategies you can use to help you deal with each of these negative emotions.

#### Frustration/Irritation

Frustration usually occurs when you feel stuck or trapped, or unable to move forward in some way. It could be caused by a colleague blocking your favorite project, a boss who is too disorganized to get to your meeting on time, or simply being on hold on the phone for a long time.

Whatever the reason, it's important to deal with feelings of frustration quickly, because they can easily lead to more negative emotions, such as anger.

Here are some suggestions for dealing with frustration:

- **Stop and evaluate** – One of the best things you can do is mentally stop yourself, and look at the situation. Ask yourself why you feel frustrated. Write it down, and be specific. Then think of one positive thing about your current situation. For instance, if your boss is late for your meeting, then you have more time to prepare. Or, you could use this time to relax a little.
- **Find something positive about the situation** – Thinking about a positive aspect of your situation often makes you look at things in a different way. This small change in your thinking can improve your mood. When it's people who are causing your frustration, they're probably not doing it deliberately to annoy you. And if it's a thing that's bothering you – well, it's certainly not personal! Don't get mad, just move on.
- **Remember the last time you felt frustrated** – The last time you were frustrated about something, the situation probably worked out just fine after a while, right? Your feelings of frustration or irritation probably didn't do much to solve the problem then, which means they're not doing anything for you right now.

## Worry/Nervousness

With all the fear and anxiety that comes with increasing numbers of layoffs, it's no wonder that many people worry about their jobs. But this worry can easily get out of control, if you allow it, and this can impact not only your mental health, but also your productivity, and your willingness to take risks at work.

Try these tips to deal with worrying:

- **Don't surround yourself with worry and anxiety** – For example, if co-workers gather in the break room to gossip and talk about job cuts, then don't go there and worry with everyone else. Worrying tends to lead to more worrying, and that isn't good for anyone.
- **Try deep-breathing exercises** – This helps slow your breathing and your heart rate. Breathe in slowly for five seconds, then breathe out slowly for five seconds. Focus on your breathing, and nothing else. Do this at least five times. For more on this, read [Physical Relaxation Techniques](#).
- **Focus on how to improve the situation** – If you fear being laid off, and you sit there and worry, that probably won't help you keep your job. Instead, why not brainstorm ways to bring in more business, and show how valuable you are to the company?
- **Write down your worries in a worry log** – If you find that worries are churning around inside your mind, write them down in a notebook or 'worry log,' and then schedule a time to deal with them. Before that time, you can forget about these worries, knowing that you'll deal with them. When it comes to the time you've scheduled, conduct a proper [risk analysis](#) around these things, and take whatever actions are necessary to mitigate any risks.

When you're worried and nervous about something, it can dent your self-confidence. Read our article on [Building Self-Confidence](#) to make sure this doesn't happen. Also, don't let your worries get in the way of being appropriately [assertive](#).

## Anger/Aggravation

Out-of-control anger is perhaps the most destructive emotion that people experience in the workplace. It's also the emotion that most of us don't handle very well. If you have trouble managing your temper at work, then learning to control it is one of the best things you can do if you want to keep your job.

Try these suggestions to control your anger:

- **Watch for early signs of anger** – Only you know the danger signs when anger is building, so learn to recognize them when they begin. Stopping your anger early is key. Remember, you can choose how you react in a situation. Just because your first instinct is to become angry doesn't mean it's the correct response.
- **If you start to get angry, stop what you're doing** – Close your eyes, and practice the deep-breathing exercise we described earlier. This interrupts your angry thoughts, and it helps put you back on a more positive path.
- **Picture yourself when you're angry** – If you imagine how you look and behave while you're angry, it gives you some perspective on the situation. For instance, if you're about to shout at your co-worker, imagine how you would look. Is your face red? Are you waving your arms around? Would you want to work with someone like that? Probably not.

To find out more about managing your anger at work, take our self-test [How Good Is Your Anger Management?](#) Also, read [Dealing with Unfair Criticism](#) and [Anger Management](#).

### Dislike

We've probably all had to work with someone we don't like. But it's important to be professional, no matter what.

Here are some ideas for working with people you dislike:

- **Be respectful** – If you have to work with someone you don't get along with, then it's time to set aside your pride and ego. Treat the person with courtesy and respect, as you would treat anyone else. Just because this person behaves in an unprofessional manner, that doesn't mean you should as well.
- **Be assertive** – If the other person is rude and unprofessional, then firmly explain that you refuse to be treated that way, and calmly leave the situation. Remember, set the example.

To learn more about handling dislike in the workplace, please see [Dealing with Difficult People](#) and [Egos at Work](#).

### Disappointment/Unhappiness

Dealing with disappointment or unhappiness at work can be difficult. Of all the emotions you might feel at work, these are the most likely to impact your productivity. If you've just suffered a major disappointment, your energy will probably be low, you might be afraid to take another risk, and all of that may hold you back from achieving.

Here are some proactive steps you can take to cope with disappointment and unhappiness:

- **Look at your mindset** – Take a moment to realize that things won't always go your way. If they did, life would be a straight road instead of one with hills and valleys, ups and downs, right? And it's the hills and valleys that often make life so interesting.
- **Adjust your goal** – If you're disappointed that you didn't reach a goal, that doesn't mean the goal is no longer reachable. Keep the goal, but make a small change – for example, delay the deadline.

Our [Back On Track](#) article provides practical steps for recovering from a major career setback.

- **Record your thoughts** – Write down exactly what is making you unhappy. Is it a co-worker? Is it your job? Do you have too much to do? Once you identify the problem, start brainstorming ways to solve it or work around it. Remember, you always have the power to change your situation.
- **Smile!** – Strange as it may sound, forcing a smile – or even a grimace – onto your face can often make you feel happy (this is one of the strange ways in which we humans are 'wired.') Try it – you may be surprised!

### Key Points

We all have to deal with negative emotions at work sometimes, and learning how to cope with these feelings is now more important than ever. After all, negative emotions can spread, and no one wants to be around a person who adds negativity to a group.

Know what causes your negative emotions, and which types of feelings you face most often. When those emotions begin to appear, immediately start your strategy to interrupt the cycle. The longer you wait, the harder it will be to pull yourself away from negative thinking.

## 10.9 Mentoring: An Essential Leadership Skill

### Mentoring from a mentor's perspective

Building a high-performing team is a key part of being an effective leader. And this includes helping individuals within your team learn, grow, and become more effective in their jobs; which is why mentoring is such an important leadership skill.

But what does mentoring involve? And what do you need to consider before setting up mentoring relationships? In this article, we'll highlight some things a mentor does and doesn't do, and we'll help you decide how far mentoring is right for you and your team.

#### What is Mentoring?

Mentoring is a relationship between two people with the goal of professional and personal development. The "mentor" is usually an experienced individual who shares knowledge, experience and advice with a less experienced person, or "mentee."

Mentors become trusted advisers and role models – people who have "been there" and "done that." They support and encourage their mentees by offering suggestions and knowledge, both general and specific. The goal is to help mentees improve their skills and, hopefully, advance their careers.

#### What are the Benefits of Mentoring?

Mentoring can be rewarding for you, both personally and professionally. Through it, not only can you build a stronger and more successful team, but you can also improve your leadership and communication skills, learn new perspectives and ways of thinking, and gain a strong sense of personal satisfaction.

For potential mentees, the benefits of mentoring can be huge. They get focused coaching and training from a skilled, knowledgeable and experienced individual, and they also get assistance and advice in navigating the many tricky situations that can arise in the workplace. This can help them work more effectively, overcome obstacles, and break through blockages that would otherwise slow or stall their careers.

But even if you understand the benefits of mentoring and it sounds like a great idea, you have to decide whether this sort of time-consuming, in-depth relationship is right for you and for the person you're thinking of mentoring. If the mentoring relationship has arisen informally and spontaneously, then the chances are that things are fine. However, if you're taking a more formal approach to mentoring, it's worth exploring your reasons for mentoring and asking yourself whether you want to take this type of commitment further. To do so, ask yourself these questions:

- Is mentoring the best way of developing the knowledge, skills and attitudes the potential mentee needs? Or would other approaches be quicker or more effective?
- How will mentoring contribute toward your own career goals, and to the goals of your team and your organization?

- Is mentoring a particular individual a good use of your time? And are you comfortable that you'll be able to devote time to him or her on a regular basis?
- Do you have knowledge, skills and experience that the mentee is likely to find helpful?
- How much personal satisfaction are you likely to get from the relationship? Does this justify your involvement? And do you like the individual enough to want to invest time in mentoring him or her on a regular basis?
- In what areas are you willing to help? Are there any areas that you don't want to go near?

### What You Should Consider

Although you may want to jump right in with both feet, make sure that you also think about these practical considerations:

- **Formality of approach** – Do you want to take a relaxed, ad hoc approach to mentoring, or do you want to approach sessions in a more structured, formal way?
- **Frequency of contact** – How much time can you commit to this relationship?
  - Can you meet (however you do that) weekly? Biweekly? Once a month?
  - How long can you spend in each meeting? Half an hour? An hour? More?
  - Do you want to be available between "formal" sessions?
- **Method of contact** – Would you prefer face-to-face meetings, phone calls, or emails? If you were to use phone calls, who places the call?
- **Duration of partnership** – Do you want to limit the length of the mentoring partnership? Do you want to set regular intervals to review whether you're both happy with the relationship, or do you just want to informally review progress on an ongoing basis?
- **Confidentiality** – How will you approach confidential business information? Think of ways to speak about general concepts and situations while maintaining confidentiality.

### Where to Draw the Line

When developing a mentoring relationship, make sure you have clear boundaries of what you can and cannot do for the mentee.

Answer the above questions to help yourself define the boundaries for the relationship. Then, when you're meeting, you'll better understand your own mindset – what areas you're interested in covering, and what you will and will not do.

Take the lead on where you'll allow the mentoring relationship to go and what ground you'll cover. As a general guide, focus on your expertise and experience. If anything is beyond your skills and abilities, refer the mentee to another expert.

For example, if a discussion about human resources issues raises a concern about employment law, consider sending your mentee to an internal expert or attorney. If conversations about work problems lead into personal or family problems, the mentee may need more focused professional help from a psychologist or therapist.



As a mentor, you can become the mentee's confidante and adviser. You may be called upon to be a "sounding board" for all sorts of issues and concerns. So know in advance how you're going to deal with difficult situations.

### **Key Points**

By mentoring effectively, you can do a lot to improve the performance of key individuals within your team, thereby helping yourself reach team and organizational goals. Mentoring can also give you a great overall sense of personal satisfaction, knowing that you're helping someone else learn and grow on a professional and personal level.

Before you begin a mentoring partnership, it's useful to think about your reasons for becoming a mentor and the practical considerations and logistics of such a relationship. If you decide that mentoring is right for you, the time and effort that you put into it can reap great rewards that far exceed your expectations.

## **10.10 Get Ready for Promotion**

### **Showing what you can do**

You do your job faithfully every day. You may even do your job exceptionally well. Why is it, then, that you've been in the same position for three years while others - seemingly less-deserving people - have been promoted?

The people who have been promoted may know one critical thing that you don't. Promotion isn't just about doing what you're paid to do. It's not necessarily even about being the best "widget" maker you can be.

Promotion is about pushing the limits of your current position. It's about showing that you have outgrown your current responsibilities, and that you're ready to take on new ones.

Think about it. If you're busy working away, producing more widgets per hour than anyone has ever produced, why should I promote you? Clearly, your value to the company is your efficiency. If I promote you, my production output may suddenly fall!

Focusing on simply what's expected of you may be a great strategy to keep the job you have. But going beyond what's expected, and stretching yourself beyond your current role, can lead to a new job with more responsibility.

Now, before you head out to stop being effective at anything, remember - in your pursuit of a promotion, you still have to perform well and meet your current job requirements. The key is identifying ways to add more value to your contribution.

Organizations move forward by solving problems. Discover ways to be more involved in the solutions - and that may move you forward too.

### **Understand Your Organization**

To prepare for a promotion, you have to really understand the drivers of organizational success. It doesn't necessarily mean doing more things - it means doing more of the RIGHT things.

Ask yourself these questions:

- What are the strategic goals of the organization?
- How does your department's work fit into the overall strategy?

- How is your boss's performance measured?
- What critical functions do other people in your team currently perform?

You may even want to make lateral moves - to similar positions in different departments - to increase your overall appreciation for what the company does. If your exposure is broader, you may also see and be considered for more promotion opportunities.

For example, if you're a communications manager and feel that there's no place else to go with your job, gain experience in other areas of the company. When you have the right mix of experience and skill, promotion to a more senior level may become a realistic goal.

### **Increase Your Responsibility**

Typically, managers are given responsibility for something, and they then delegate various pieces to their staffs. They delegate in order to have more time to work on higher-level tasks. These higher-level tasks are what you want to get involved in.

To gain access to them, you first have to prove that you're capable of handling the increased responsibility. Here are some ways to prove your capabilities:

- Complete your work thoroughly and with as little supervision as possible. This involves working well as part of a team, while also demonstrating individual competence.
- When you have questions for your boss, come prepared with solutions as well.
- Expand your skill set. Determine what you need to learn to add more value, and make a plan to acquire those skills. Also, find out about the skills you'll need in the new role, and make sure you acquire these.
- Get up-to-date, and stay current in your field, perhaps by reading the industry press. Find opportunities to continue your learning and education.
- Become aware of the economic and business pressures facing your organization.
- Use good judgment when carrying out your responsibilities. Think about cost versus benefit, review bottom-line results, and know how your role impacts the company as a whole.

Then, look for opportunities to lead projects. This can help you practice your leadership skills and demonstrate your ability to take on new responsibilities. Try the following:

- Volunteer to take on new projects and other opportunities, to learn and practice other skills. For example, offer to cover a co-worker's responsibilities while he or she is on vacation.
- Identify opportunities to delegate your own work. This frees up your time and allows you to practice supervising others' work.
- Offer to take on tasks that you know your boss dislikes or is weak in. You'll expand your range of experience, and you'll make your boss's job easier - it's a win-win!

### **Get Innovative**

To prepare for a promotion, always think about how to do things better. That's one of the defining characteristics of leaders. How can you do something cheaper, faster, or with less waste? Consider the following:

- Demonstrate critical thinking when you report to your boss. Rather than accept things as they are, think how you can improve them - and come up with innovative ways to do those things better.
- Understand the big picture, and incorporate it into your decisions and solutions.

- Look for things that aren't being done at all. Innovation isn't always improving things that already exist - it's often adding something of value as well.
- Put forward your ideas, even if you aren't sure of the response. This demonstrates both your imagination and willingness to take risks. Be prepared for many of your ideas to not be accepted.

If you prove that you're interested in improving organizational performance and that you can come up with some original ideas, this can be a great way to set the stage for promotion. Learn more about innovative thinking in [Practical Innovation](#).

### Set Promotion Goals

Ultimately, you're the one who needs to work proactively to make a promotion happen. If you rely on someone else to make it happen, you'll probably end up disappointed. Take action with these steps:

- Identify your career goals within the organization.
- Talk to people who hold the kinds of positions and levels of authority that you want. Find out what they did to get where they are. The more you learn from other people's experiences, the better.
- Evaluate your strengths, and set goals to learn the skills you need for success.
- Take note of who your internal competition might be - others in your company who may want the same position you want - and work hard to distinguish yourself and make yourself stand out.
- Look for a mentor within the organization. Having someone to talk to, and who might champion your ideas, is a great benefit. See [Finding a Mentor](#) for practical steps and strategies.
- Set your goal, and follow it through! See [Personal Goal Setting](#) for practical tips.

When you run into obstacles, find ways to work around them. A positive attitude can go a long way toward reaching your goals, and getting noticed for your ability to inspire and motivate.

### Communicate Your Desire

Doing all of the above will likely be met with great appreciation. That won't guarantee a promotion, though. Let people know what you want, and then proactively work to achieve it.

Here are some steps you can take to make your wishes known:

- Identify a role or position toward which you want to work.
- Using your knowledge of the organization, find out what experience and skills are needed to get that job.
- Work with your boss to set performance objectives so that you can achieve the necessary skills and experience.
- Network with people in the company. Let as many people as appropriate know what type of role interests you. Seek advice on how to prepare for that role.
- Ask for the promotion when it becomes available. If you aren't ready yet, use this as an opportunity to develop the skills you need.

As you execute your promotion plan, let others who have influence over the decision know what you're doing. You have to be your own best champion: Preparing for a promotion is no time to be quiet and shy. You need many people to know what you're capable of and what you want.

## Key Points

Earning a promotion is partly within your control. Simply doing what's expected of you, and even being the best at what you do, are not guarantees of advancement.

To prepare for promotion, increase your value to the organization. Be smart about the type of value opportunities that you create. Understand what drives your company's success, take on more of the right responsibilities, expand your skill set, and communicate your promotion goals to others.

By being proactive, you can create the path to the position that you want.

## 10.11 Get the Recognition You Deserve

### Learning how to get praise

Imagine this: You stay late at work, consistently win accounts that your co-workers only dream of, never miss deadlines, and never show up late - and to top it all off, you finish even your worst projects successfully and ahead of schedule.

You'd think that by doing all of this, you would, at least once in a while, get thanks and recognition from management? Well, you wish. Unfortunately, your boss is busy dealing with a "problem" member of the team, and as a result, she forgets to show any gratitude to her stars. That includes you.

Have you ever been in a situation like this? Working hard and getting ignored by your boss can be rough. That's why you sometimes have to take matters into your own hands.

Boasting of your own accomplishments can feel awkward. But look at it this way: If your boss doesn't notice your hard work, and you don't point it out to him or her, then what happens when you ask for a raise? How will he or she know you're ready for that promotion, or if you can handle that huge-but-fascinating project?

Things don't have to be like that. We'll show you how to get the recognition you deserve without looking like you're seeking attention. Believe it or not, there **is** a way to do this.

There are many types of recognition, so decide what type **you** want.

### Step One: Decide What You Want

Companies often thank staff with awards, certificates, or bonuses. However, people often just want simple praise. We want to know that our work is meaningful and that we've made a difference. An "Employee of the Month" certificate, or a cold, hard check doesn't always communicate that.

So, what exactly are you looking for? It's important to really define this, because everyone wants something different. Do you want a simple "thank you"? An award ceremony in your honor? A raise?

### Step Two: Define Why You Deserve Praise

Don't walk into your boss's office with no advance preparation to say what a great job you've been doing. Why? Firstly, it would seem odd. Then, if you're a bit nervous, you might forget something important that you've done. You might forget the help a co-worker gave you, and leaving out that

person could speak poorly of your character. Be sure to make yourself look good, but also share credit where credit is due.

Make a list of the accomplishments you'd like to discuss. Beside each one, list the value that accomplishment has brought to the company.

### Step Three: Praise Yourself

This is where you've got to get creative. You know your boss and your business environment, so think of ways to let your boss know how hard you've been working.

If you tell your boss directly, then do it carefully and tactfully - in a private area. You know that list of accomplishments you just created? Read that over a few times before your meeting. As you talk, emphasize how you had help and how your co-workers should be rewarded for their hard work as well.

If this feels a little too much like bragging, then think of ways to let your boss know what you're doing without being so obvious or bold. For example, send your boss an email every time you win a new account, or when you're finally able to please your company's worst customer. These little "progress reports" keep your actions in the open in a delicate, not-too-obvious way.

You can also praise others in front of your boss. By bringing their hard work and accomplishments to your boss's attention, she may also notice the great job that **you've** been doing. Keep it genuine and honest, however. If you appear insincere, then people may notice, and you may look bad. If you have something good to say, then say it, but don't speak up if you don't really mean it.

#### A Few Tips:

Look closely at your boss's actions - he or she may be praising you, and you don't even realize it. For example, let's say you spent hours writing the annual message to shareholders, and your boss only quickly glanced at it before passing it on to be copied. Before you get upset, consider that her actions may really say that she trusts you to do top-notch work, and she doesn't have read every line to know you've done a great job. Yes, a "thank you" for a job well done is nice, but this kind of trust is also a compliment.

In your work environment, perhaps all the problem behaviors get noticed, and all the really great ones seem to be ignored. If so, then you may have to do something bold to get management's attention. Tell your boss honestly how members of the team need some recognition. Keep the focus off yourself, and help your boss understand how everyone would be more motivated if they just got a little praise now and then.

### Key Points

Although not everyone is comfortable talking about their accomplishments, you might harm yourself if you don't speak up.

If your boss doesn't see the great work you've been doing, he or she might give that promotion or special project to someone else without knowing any better. It's up to you to prove that you can handle the added responsibility - and to do that, your boss has to know what you've already done.

Think of subtle ways to get your boss's attention by talking privately, sending emails about small accomplishments, and praising your teammates when he or she is around to hear it. Even if you keep the focus off yourself, it may get him or her to notice what you've been doing as well.

**Apply This to Your Life:**

Ready to put this into action? Here are some easy ways to use this tool in your life right now:

- Begin by recognizing the accomplishments of others. If you notice co-workers doing something great, send them emails praising their efforts, and **send copies to your boss**. This can show your boss that you're leading by example.
- Don't forget that your boss might need some praise and recognition too. Send him or her an email when she's made a difference in your day, and consider copying that email to his or her boss.
- If you're a team leader, keep your eyes open for activities and co-workers that deserve praise. Whenever someone does something that's earned a heartfelt "thanks," send that person an email and copy it to your boss.

These are just a few ways you can "raise the bar" in your workplace to get other people thinking about praise and recognition. When you recognize the efforts of your team, you should steadily earn your own praise as well.

## 10.12 Living with a Lack of Job Security

### Coping with uncertainty

Some of the people you know may have only had a few jobs - or even one job - in their lives. If so, and they're not working for the government, they're likely to be older than 50, having grown up at a time where company loyalty and hard work provided a steady career and a comfortable pension. They might have spent 20 or 30 years with the same company, never making the break to search for something better, and never having a reason to fear layoffs.

These days, however, the world is much different. As a result of globalization, outsourcing, contracting, downsizing, recession and even natural disaster, "job security" can seem like a thing of the past. People entering the workforce within the past few years may have more than 10 different jobs before they retire. The lack of job security that goes with this is something that almost everyone must face at one time or another, and learning how to cope is essential to being happy, and keeping stress away.

So, how do you deal with this uncertainty?

First, learn how to handle the psychological pressure and stress. It's important to realize that not everyone reacts the same way to job insecurity. Your home life, willingness to adapt to change, and financial situation are much different from those of your colleagues, so don't expect yourself to feel or react like they do: they'll manage stress their own way.

Next, be prepared. It's impossible to know what the future will bring, so preparing in advance can help reduce your worries, because you'll know you've done all you can.

We'll show you what you can do now to deal with the feeling of a lack of job security.

### Coping with Stress

Living with constant insecurity can be stressful. Some studies suggest that living with job insecurity - the "fear" of losing your job - can be more harmful to your health than actually losing it. Here, keeping a positive attitude can make all the difference!

If you're stressed about your career, try some of these tips:

- Remember the saying "Whenever one door closes, another one opens." Living with uncertainty can be uncomfortable, but you can control how you look at it. It can be an adventure, and the chance to do something new.
- If you're a good worker with marketable skills, then you have a lot to offer other potential employers if you get laid off. This is why it's so important to keep your skills relevant and up-to-date.
- In today's job market, the technical skills you need can change quickly. So, develop your nontechnical skills as well. If your lack of job security is due to a drop in demand for your technical skills, think "outside the box." What else can you do - and how can you prove that you could learn a new line of work? Look at your track record of being adaptable, your organizational skills (time management, team management, and leadership), and your people skills. For more information, read our Book Insight on "[Career Intelligence](#)" by Barbara Moses, and use this site to build solid career skills.
- Stress can result from a feeling that you don't have control over your situation. Remember, you ALWAYS have control. It's your life, and it's within your power to change it. If you're afraid that you might get "downsized," then take control and act. Look for lateral transfers within your company, to a different department or even a different branch. Start learning about other departments; perhaps your skills would allow you to do something completely different within the organization. Be PROactive instead of REactive.
- If you're part of a team (or if you're leading a team), allow everyone to voice their fears. Communicating and expressing frustrations are important, but don't let these fears dominate the group. This can create negativity and hurt morale. So, have an open discussion, but focus on what you can all do to move forward and cope.

### Prove Your Worth

If you were your boss, and you were forced to eliminate one position, who would you lay off: the person who leaves at 5:01 pm each day and complains all the time, or the person who's willing to take on extra work and always has something positive to say?

If you face uncertainty in your field, make sure you give value to your company. You'll have to do more than "just the minimum" if you want to keep your job.

Be willing to stay late to finish a project. Help another team member who's falling behind. Do things to show your boss that you love your job and you'll do what it takes to help the company succeed. This kind of commitment can help to set you apart from the crowd.

### Stay Current

Keeping your skills current is essential if you want to offer value to your company. Make sure you're up to date on your industry's certifications and trends. Take outside classes and read trade publications, so that you know what's going on in your field.

Also, think about taking classes that would benefit your role in any company. Skills like effective time management, leadership techniques, and office organization can help you anywhere - no matter what job you're doing.



### **"Brag" About Yourself**

Many people resist talking about their accomplishments because they don't want to boast. But think of it this way: your boss may not know how great you are, or what you're capable of doing, if you don't tell her.

By talking about your accomplishments, you keep him or her informed of your value. For more on how to brag about yourself (without being viewed as arrogant or overconfident), read [Getting the Recognition You Deserve](#).

### **Keep Your Résumé Up to Date**

This is smart for everyone to do, not just those who are actively looking for work (or afraid they might be soon).

When your résumé is current, you can be ready at a moment's notice to apply for a new position - even one within your own company. You won't have to rush to make changes (and risk making mistakes), and you can be sure to present yourself in the very best light. If you wait until the last minute, you might forget an important accomplishment that could mean winning - or losing - the job.

### **Save Your Money**

Few things are more stressful than wondering how you'll pay your bills if you suddenly lose your job. This alone can convince people to accept the first job offer they receive, even if it's not the right match.

Save at least three to six months of living expenses - this can help you take the time you need to find the best opportunity, if you are laid off. It can also give you the resources you need to look further afield, if work dries up in your area. This can help you turn a bad situation into a chance to reevaluate your career, and put yourself onto a new, exciting path.

### **Key Points**

In today's business world, living with job insecurity is a reality for many. But it doesn't have to be stressful and negative.

Preparing yourself for change is a great way to feel better about the situation. Take control by ensuring that your company knows how great you are, and invest time in keeping your skills up to date. And save some money, so you don't have to worry about paying your bills if you do lose your job.

If you do get laid off, remember that the world is full of opportunities. Changing your mindset can go a long way toward reducing your stress. Look at this change as an adventure and as the chance to try something new. Focus on the positive, not on doubt and uncertainty. Remember, your life is what you make of it!

## **10.13 Life after Job Loss**

### **Coping with the emotional turmoil**

So, it finally happened. All of the headlines and statistics about the current economic crisis have become personal: you've been laid off.

Given the intensity of the stress you're likely to be experiencing right now, it helps to know what to expect in the weeks and months ahead. After all, the more you know, the better equipped you'll be to handle the ups and downs that you're likely to face.

### The Five Stages of Loss

In a famous piece of research, Elisabeth Kübler-Ross identified five different stages of grief that people go through when mourning the death of a loved one. Sure, losing a job may not be quite as upsetting as this, however it can be a profoundly unhappy and stressful experience, and it can help to think in terms of Kübler-Ross's stages. These are:

1. Denial.
2. Anger.
3. Bargaining
4. Depression
5. Acceptance.

Not everyone experiences each stage the same way, or in the same time frame. You might skip a stage, or spend a long time in one stage and move quickly through the next one.

Also, your age and life situation might partly determine how long you spend in each stage, or whether you experience a certain stage at all. A younger worker with no mortgage payments and no children may experience denial and self-criticism, but then skip directly to acceptance. Workers who have more responsibilities might take longer to move to the acceptance stage, simply because more stress is involved.

Let's look at the stages in more detail, and think about what you can do to cope with each one.

- **Stage One: Denial**

If you're thinking things like "I can't believe I've lost my job" or you think that this is all a silly administrative mistake that can be fixed, then you're in Stage One.

To cope with denial, you have to open your mind to the fact that that bad, and even unjust or wrong things do happen, and that you have to live with them.

Don't pretend that you're just on an unexpected vacation or – worse – put your business suit on and catch the train as usual in the morning, but spend your day in a library or coffee shop with a newspaper. This is only prolonging the process of getting over what has happened.

- **Stage Two: Anger**

Once you're past the initial shock of losing your job, you might begin to feel very angry – angry at yourself, your boss, your company, or the economy in general. After all, if you've worked hard and "given your all", surely you deserve better than this?

You might become angry at family and friends as well.

This can be one of the most difficult stages, especially for the people around you. If your anger causes you to treat others badly, use [anger management](#) techniques, or seek counseling. Hurting the people you love will push them away, and make you feel worse.

To cope, try to express your emotions in a healthy way. This doesn't mean that you should start kicking and screaming. Talk with family and friends, or even a counselor. This may give you the outlet you need to move past your feelings of anger.

- **Stage Three: Bargaining**

After your anger has burned itself out, you might start bargaining with yourself or your organization in the hope that your job loss is somehow reversible.

In Kübler-Ross's original model, this reflected a form of subconscious bargaining with a higher power: "I just want to live to see my daughter married..."

In the case of job loss, this is likely to be more practical. For instance, you might go back to your boss and offer to work for less money, or reduced benefits. You might offer to work part-time, or train any new hires that come through the door.

Bargaining is almost always futile. Picture it like trying to board a ship that's setting sail; you've got one foot on the ship and one foot on the dock. Straddling them both will get you nothing but a miserable drop into the ocean.

To cope with this stage, be aware of what you're doing. Put your energy into moving forward.

- **Stage Four: Depression**

As the old cliché says, "Whenever one door closes, another one opens somewhere." But, as someone else also said, "It's the hallway in between those doors that's torture."

Once you realize that your anger and bargaining tactics aren't working to get your job back, you might slip into a state of depression.

Depression is the beginning stage of acceptance. You're grieving for your lost job, and that's an important step because it shows you finally coming to terms with what happened.

So what can you do to cope? Accept that losing your job wasn't your fault. Or, if it was your fault, learn from the experience, forgive yourself, and move on. You can call it fate or destiny, but consider that something better might be out there waiting for you. You just have to be willing to find it!

Start doing something productive. Remember, your job right now is to find another job.

This is also a great time to volunteer for an organization that you care about. Helping others can be very healing, and it could give you a sense of control in your life.

**Warning:** If you're experiencing significant or persistent unhappiness at this or any other stage, seek the advice of an appropriately qualified medical practitioner. Depression is something that can be dealt with quickly and effectively if detected, but is something that can be painful and lingering if left untreated.

- **Stage Five: Acceptance**

You've finally realized the truth: the layoff wasn't your fault, or if it was your fault, you've learned from it. You're a talented, incredible, exciting person with a lot to offer in your next job.

And the best news? You've faced the difficulties of losing a job, and you're stronger because of it.

There's no set time limit for any of these stages. Again, you might skip some stages, or go through all five: everyone is different.

If you feel like you're stuck in one particular stage and can't move past it, then seek help so you

**Tip:**

Now that you no longer have a boss to manage your performance, give yourself a performance appraisal at regular intervals. Assess your work skills and also how you're doing at looking for another job.

can move forward.

**Key Points**

Losing a job can be emotionally upsetting and overwhelming. Many experts agree that people go through five stages of loss or grief, similar to what we experience at the death of a loved one: denial, anger, bargaining, depression and acceptance. Give yourself time to work through each stage. Talk about your emotions, do something productive, and keep moving forward.

## 10.14 Breaking the Glass Ceiling

### Reaching for the top with everyday tools

Do you feel that you've gone as far as you can with your current employer? Despite knowing that you have much more potential, is there a limit for "people like you" in your organization?

If so, you've hit what's known as the "glass ceiling." This is the point at which you can clearly see the next level of promotion - yet, despite your best effort, an invisible barrier seems to stop you from proceeding.

Traditionally, the glass ceiling was a concept applied to women and some minorities. It was very hard, if not impossible, for them to reach upper management positions. No matter how qualified or experienced, they simply were not given opportunities to further advance their careers.

Today, there are many more women and minorities in powerful positions. However, the glass ceiling is still very real. And it's not always limited to gender or race.

Have you been pushed up against a glass ceiling? This can happen for many different reasons. Are you too much the champion of change? Do you have difficulty communicating your ideas? Are you quieter and less outgoing than the people who get promotions?

Whatever the reason, you have a choice. You can accept your situation and be happy with looking up and not being able to touch what you see. or you can smash the glass with purpose and determination.

If you do, indeed, want to break through that glass, here are some steps to take.

### **Identify the Key Competencies within Your Organization**

Key competencies are the common skills and attributes of the people in your company's upper levels. These skills are often tied closely to the organization's culture and vision.

Companies that value innovation and strive to be leaders will probably promote individuals who are outgoing, risk takers, and not afraid to "tell it like it is." However, if you work for a conservative company (such as a publicly owned utility) chances are that top management are analytical thinkers, with a reputation for avoiding risk and making careful decisions.

Ask yourself these questions:

- What are the values of your organization?
- What behaviors does your company value and reward?
- What type of person is promoted?

Understand what sets your company and its leaders apart. This is the first step toward discovering how to position yourself for a top leadership role.

To further clarify these ideas, read [Core Competence Analysis](#) and [Deal and Kennedy's Cultural Model](#).

Two universal competencies for top management are effective leadership and effective communication. Each of these is complex.

- Read everything you can about leadership styles, skills, and attributes. Mind Tools has an excellent collection of articles on [Leadership Skills](#). You may also want to consider taking the Mind Tools [How to Lead](#) course.
- Communication skills will help you, regardless of the level you want to reach in your career. Start with the [introduction to communication](#) skills, and learn to use as many of these tools as possible.

### **Set Objectives to Align Your Competencies with Top Management**

Once you know your target, set goals to get there. You're responsible for determining your own career direction. Be proactive and go after what you want, because it probably won't be handed to you.

Do the following:

- Let your boss know that you want to work toward a higher-level position.
- Ask your boss what skill areas you need to develop.
- Work together with your boss to set goals and objectives, then monitor and measure your performance.

Remember to concentrate on areas of your performance that you can improve. Don't set a goal to achieve a certain position by a certain time. This can be discouraging if it doesn't happen. For example, set a goal to consistently demonstrate assertive and clear communication. If you achieve that goal, no matter what job title you have, you've succeeded! See [Personal Goal Setting](#) for more ideas on how to define motivating goals.

### Build Your Network

You should also build relationships with other people in your organization. You never know who may be in a position to help you or provide you with valuable information.

It's important to network in all areas and levels of your company. Many people tend to think it's best to make friends at the top. However, to be effective and actually make it to the top, you'll need the support of colleagues at other levels as well.

Try these tips:

- Reach out to new people on a regular basis.
- Get involved with cross-functional teams.
- Expand your professional network outside of your organization. If you can't break the glass ceiling in your company, you may have to look elsewhere for opportunities.

Read more about [Professional Networking](#).

Use the climate in your organization to your advantage. While "politicking" is often seen as negative, you can help your career by understanding and using the political networks in your company.

### Find a Mentor

Having a mentor is a powerful way to break through the glass ceiling. The barriers that you face have likely been there for a long time. Past practices, biases and stereotypes, and old ideas are often long established at the top of many organizations.

Is upper management reluctant to work with certain types of individuals? Do they exclude certain people from important communications? A mentor can help you learn how to get connected to the information and people who can help you. A mentor can also be a great source of ideas for your professional development and growth.

Ask yourself these questions:

- Is there someone in upper management you can approach to help you?
- Will your boss be able to provide mentoring support?

Read [Finding a Mentor](#) for details on what to look for in a mentor and ideas on how to find one.

- Are there people with strong political power who can offer you assistance?

### Build Your Reputation

Ultimately, the way to get ahead is to get noticed. You want people to see your competence, leadership abilities, communication skills, technical knowledge, and any other competencies that are typical of people at the top.

Develop your skills and network with people so that your name becomes associated with top management potential. To do this, you need to build a reputation as the kind of person who fits the description of top management. Visibility is very important. Remember, while you can see up, those at the top can see down. Make sure that what they see is you!

Follow these guidelines:

- Seek high-profile projects.
- Speak up and contribute in meetings.
- Share ideas with peers as well as people in higher positions.
- Identify places where your reputation is not what you want it to be, and develop plans to change them.

For more tips on building the right kind of reputation, see [What's Your Reputation?](#)

### Know Your Rights

Finally, watch for discriminatory behavior. Sometimes biases and stereotyping can cross the line into discrimination. It's unfortunate for both you and your organization when situations like this occur.

Don't just accept frustration and failure. Know that you're doing everything right, and arm yourself with a good understanding of your rights regarding official company policies and local

Mind Tools' article on [Avoiding Discrimination](#) shows you how to protect yourself if you face this regrettable situation.

laws.

### Key Points

To get ahead and reach the leadership level you want, you need to champion and market yourself. That means proactively managing every step of your career. If you can't seem to break through a glass ceiling, you might have to work harder than others.

We can't all be exactly the type of upper management person our company wants. What we can do is develop the skills that the company values. Arm yourself with a development plan as well as the help of your boss, a strong network, and, hopefully, a mentor. You can then build and showcase the skills that will help you climb the corporate ladder. Push yourself beyond your comfort zone, and you may find new zones of opportunity.



### Apply This to Your Life

If you're frustrated with your career advancement, consider the following:

- Do you have a career plan in place? If you don't, now is the time to make one!
- Does your boss, or anyone in your organization, know what your goals are? Unless people know what you want, they may keep you in the same position and assume you're happy there.
- Do you feel alone and unsupported in your career goals? If so, who can help you change that? We all need to make our own success, but most people don't succeed all on their own. Ask for support and assistance - this is a sign of strength, not weakness.
- What areas for skill development have been pointed out to you in the past? Are you making improvements?

Are you facing a glass ceiling? Recognizing that the ceiling exists is the first step. The ceiling won't be removed unless you do something about it. Apply some of the ideas in this article, and monitor your progress.

## 10.15 Getting a New Boss

### Starting an important new relationship in a positive way

You may not have asked for it. You probably didn't plan for it. Yet, like it or not, your old boss is leaving, and a new boss is arriving to take his or her place. So, what's going to happen now? Does this mean that you'll also have to change your job? Or is this a good opportunity to make a great first impression, and potentially change the direction of your career?

Many people in this situation limit their thinking to what has changed about themselves - which, in this case, is nothing. However, a new boss will likely have different opinions, different policies, and even a different management style. The situation has now changed: if you simply keep doing what you did before, you're not facing reality.

You need to accept that this really is a new opportunity to make a first impression (this is one of the rare times that this possibility exists). But you also need to know how and when to act, as well as which problems to avoid. You don't want to overwhelm - or underwhelm - your new boss. There's a proper balance that you can find.

In this article, you'll discover what's usually important for new bosses, and you'll learn how to make a positive and appreciated contribution that's good for both of you.

### So, Who's Really the "New Hire"?

In some cases, your new boss may be the 'new hire'. However, you are also new to your new boss. In many ways, it's similar to when you first started your current job - you have to work to make a positive impression; and you have to be supportive, and prove yourself.

Whether or not you worked well with your old boss is no longer relevant. It's up to you to build a relationship with your new boss. Things will likely be different, so expect to change the way you work; and expect to experience a three-month adjustment period, during which you'll both "settle in" and get used to each other.

## Your New Boss's Background

Your new boss may come from one of many different backgrounds. He or she may have been promoted from within the team or from elsewhere in the organization. Or your new boss may have had a similar position in another company - or even an entirely different role. This can lead to three possibilities:

1. Your new boss understands that he or she doesn't really know the work you do, so the boss may look to you for help.
2. Your new boss thinks he or she knows what you do, but doesn't. This person needs your help, but doesn't know it. Your goal is to educate tactfully, considerately, and sufficiently.
3. Your new boss knows what you do, so you can focus on the other aspects of building your working relationship.

Even if your new boss knows what you do, this doesn't necessarily mean that you'll interact with this person the same way you did with your old boss.

Perhaps your old boss knew exactly what to do in all situations, because she did your job before you got there. But your new boss may have a more general management background. He or she may not have detailed knowledge that you can use to check your work, or may not be able to offer advice on specific topics (this can be particularly true if you have a technical role). On the other hand, this can be a significant opportunity for you to accept a new level of autonomy and responsibility - and get great career experience!

## Making the Relationship Work

An important step in managing the relationship with your new boss is to accept it. Whatever you might have thought about other candidates for the job (including, perhaps, yourself), you must face the reality that your company made a choice, and you have to work with this new person. (If you were competing for the job, and particularly if your new boss is an ex-colleague, don't sulk about not getting the job yourself; and don't be disrespectful towards your new boss. If you do either of these, you're setting yourself up for conflict and failure.)

Some parts of this situation don't apply equally. You have one relationship to manage with your boss, but your boss has several relationships to manage with all team members. However, your relationship needs to be a top priority for you. Remember that your boss is also a "gatekeeper," with the ability to allow you - or deny you - access to a number of things that can impact your job satisfaction.

Our article [Managing Your Boss](#) discusses these situations as well as how to make adjustments for a boss's weaknesses that you may discover as the 90-day settling-in period continues.

**Tip:**

Be helpful, but don't appear too eager. "Sucking up" may bother your boss as well as your colleagues. Offer your help, and then assess how your new boss reacts to your help: this will help you strengthen the relationship.

## Helping Your New Boss Succeed

Your new boss will likely target several goals during the early weeks and months, because this will help confirm to upper management that they made the right hiring choice.

Our workbook [Congratulations on Your New Role... Now What?](#) covers this in detail, but we've summarized some of the information here. This is what your new boss is likely to be thinking - and it may therefore show you how you can make a positive impact:

- **Building competence and learning the new role** - This includes dealing with information overload and creating a learning plan.
- **Learning about and understanding the team members** - This means not only getting to know them, but also figuring out who the key players are.
- **Creating quick wins to establish credibility** - Credibility also means focusing on results that are important to the new boss's boss, and linking tangible results with longer-term business goals.

### Necessary Conversations with Your New Boss

Here's a checklist of what you and your new boss should understand and agree upon as you get to know each other. These conversations can range from informal chats at the coffee machine to formal meetings in your boss's office or elsewhere. Use common sense, individual preferences, and mutual availability as your guiding factors.

- **Determine how your boss views the current situation** - Find out how your new boss sees things. For example, does your new boss think that the objective is to maintain a currently strong position or turn around declining performance? You may not agree on every point, but at least you'll know.
- **Learn what your boss's expectations are** - What does your new boss want from you now and in the longer-term future? How will your success be measured? If you understand what will help your new boss succeed (see above), this will help you relate to his or her expectations, while making sure that what's asked of you is still realistic.
- **Figure out your boss's working style** - What you do is important, but so is how you do it. You have your preferred way of working, and so does your new boss. Find out how your boss likes to operate, and show him or her how you like to operate. This will lead to a better chance of achieving more together - and a better chance that both of your careers will benefit.
- **Determine what resources are available** - If you need more resources or need to keep what you have now, let your new boss know.
- **Establish opportunities for personal development** - This is a mutual benefit opportunity. Ask if you can contribute to particular activities that will also help your career development.

Use good judgment as you have these different discussions. For example, make sure that you've already established sufficient credibility before you start a discussion about personal development.

### Key Points

When you get a new boss, you'll both go through an adjustment period, usually of about three months. This period is important for you, because it's an opportunity to build a strong and positive relationship with your new manager. Depending on your boss's profile and background, you may need to educate him or her on many things, including your own role in the organization. Follow our tips to succeed with your boss - and you'll help your boss succeed as well.

## 10.16 A Happy Ending

### Wapping up your current role before moving on

It's finally happened. After months of hard work, and numerous interviews, you finally got the job you've always dreamed of. In just a few short weeks, you'll change departments, - even companies - and take on a new role, with a new team and new responsibilities. Congratulations!

There's a lot to think about when you change jobs - whether it's because of a promotion, or a department change, or a move to a new organization. It's an exciting time, but what can you do to make the transition go smoothly for you, and easier on the people you leave behind?

Well, most importantly, you'll need to bring the work in your current job to an ordered close. To help you pass the baton onto the person who's taking over from you, you'll need to bring projects up to date as far as you can, or leave a list for your replacement, where you outline the tasks you've completed, and what remains unfinished.

If you're a manager, and one of your team members is leaving, you'll have your own set of challenges. At the forefront of your mind will be how you can make sure the person completes his or her projects before moving on.

In this article, we discuss why it's so important to 'close' your job before you make a transition - and how to make sure you don't leave your boss, your team, or your replacement with any loose ends.

#### Part 1: Closing

Depending on your company and your situation, you may have as little as one week, or as much as a month or more, to prepare for your move. Aim to do as much as you can in the time you have. Making sure things are in good order will help your team members adjust to the change.

It will also help you leave on good terms. It's important to remember that, if you're changing departments, you may eventually work with your former team members again. Someone who's your junior now could be your boss or your client in 10 years' time, so it's preferable for everyone all round to maintain good relations.

What should you do before you leave? Here's a list of actions for your 'to do' list:

- **Bring your projects up to date** - You can't always complete every project before making a transition, but if you finish as much as you can, this will make life easier on the person who takes your place.
- **Prepare a report for your replacement** - Detail what this person needs to know: future projects, who your clients are (and their contact information), tasks you recently completed, and how you did them - and anything else that's important.
- **Give 'insider' tips** - Think about what you know now that you didn't know when you started this position. For example, if you're in charge of ordering supplies, it might have taken you months, or years, to figure out which vendors give the best deals. Or there may be an administrative procedure that saves you time. Why not leave this insider information for your replacement? It will only make the transition easier.
- **Take a copy with you** - When you move departments, take with you to the new job an electronic copy of all the documents you prepare for the old job, containing details of where the files are, and the status of ongoing projects, etc. If your successor hasn't started by the time you leave, or if the new person loses the background material you left behind, you'll be

able to help quickly, with a minimum of annoyance to you, when they track you down to ask about files and project status.

- **Help train your replacement** - If you have the opportunity, this will ease the stress on both your boss and the person taking over from you. If your replacement hasn't yet been chosen, consider briefing another team member who may temporarily take your place.
- **Contact key business associates** - Let clients, vendors, and other key people know when your last day is, and whom they should contact after you've gone. Then they won't be confused or frustrated if they try to reach you, and weren't told of the personnel change.
- **Plan for your new role** - While you're tying up all the loose ends in your current job, it's also important to learn as much as possible before you take on your new role. The first 90 days are crucial for making an impact in a new job, so it helps to be equipped, knowledgeable, and focused on your first day. Our workbook [Congratulations on Your New Role. Now What?](#) will help give you a head start.

## Part 2: Saying Goodbye

When you think about it, most people spend more time at work than they do at home. This means that your co-workers are also often your friends. Maybe, in some cases, you even think of them as family.

Even if you're not close to your team, you spend your days with these people, so saying goodbye can be difficult. You don't want to say something you might regret later.

So, how do you say goodbye with grace and tact?

- **Don't brag** - Don't boast about your new position, say how happy you are to 'get out of here,' or talk about your higher salary. This is likely to leave a bad impression with your co-workers. Remember, they're the ones staying behind. Be considerate.
- **Say 'thank you'** - If there are people who helped you at work, thank them. Be specific - if you couldn't have completed a project without someone's expertise, tell that person.
- **Send 'thank you' cards** - This is a way to thank team members who really made an impact on your life, either personally or professionally. Again, be specific when you tell them how they made a difference.
- **Don't say bad things** - Don't say negative things about anyone. Remember, just because you're changing departments or companies doesn't mean you'll never work with these people again. You may run into the same people time and again in different companies and different roles, especially if you stay in the same industry for most of your working life. Leave a good impression, and don't make any enemies on your way out.

## Part 3: Managing Leavers

As we said earlier, if you manage someone who's about to make a transition, you have to deal with your own set of challenges. This person might be dreaming of the new job, and not concentrating on current tasks - but your team still has to get the work done.

Make sure this person completes his or her tasks before leaving. It's very hard to push replacements into a half-finished project, and expect them to meet deadlines and goals.

What steps can you take to make sure that things are getting done?

- **Check in regularly** - Giving the person in transition a deadline may not be enough. Remember, the departing person has a lot to do. Check in every day, or every few days, to see how the projects are progressing.
- **Ask for a 'to do' list** - If there's time, ask the person to write a list of important tasks to give to the replacement. What will the new person need to prioritize and focus on during the first week? The first month?
- **Don't assign new work** - Don't give a lot of new projects to someone who's leaving. Think of how stressed you would feel if you were changing jobs, and your manager did that to you. If possible, let the person finish current work, and redirect new projects to other team members.
- **Gather the team for a farewell** - If it's appropriate, get everyone together on the departing person's last day to say a few words, and thank the person for his or her hard work and accomplishments. If you don't know the person well, have another team member who does know the person stand up and say farewell. You might also give the departing team member a card or small gift. This can leave a positive lasting impression.

### Key Points

Job transitions can be stressful. However, by taking the time to prepare for closure, you can reduce the impact on both you and your team. Be considerate, and leave a good impression. Remember, you never know when you might work with your former team members again, so don't brag or complain on your way out.

If you manage someone who's leaving, remember that this person has a lot to do. Yes, he or she needs to complete projects, but be reasonable, and offer to help where you can. Help prioritize the remaining tasks, so the new person starts with a clear focus.

# Moving On

We hope you've enjoyed the Mind Tools E-Book.

We have put a great deal of effort into developing this and our other material. If you have any suggestions on how we can improve it for the future, then please let us know at [customer.helpdesk@mindtools.com](mailto:customer.helpdesk@mindtools.com) or through the Mind Tools web site at [www.mindtools.com](http://www.mindtools.com). Alternatively, if you have enjoyed this guide and found it useful, please [let us know!](#)

The Mind Tools web site at [www.mindtools.com](http://www.mindtools.com) offers articles on a wide range of important career development and personal effectiveness techniques, as well as a range of related products and services.

Members of the Mind Tools [Career Excellence Club](#) benefit even further, from additional resources including podcasts and forums where they can discuss career issues and get ideas from Mind Tools Team as well as from other Club members. Click [here](#) to find out more about how you can take charge of your career by joining the Mind Tools community.

Best wishes, and enjoy using Mind Tools!



James Manktelow  
CEO  
Mindtools.com



## Further Reading

*The 10 Day MBA*, Steven Silberger, Piatkus, London, ISBN 0749914017

*10 Minute Time & Stress Management*, Dr David Lewis, Piatkus, UK, ISBN 0749915366

*Applied Imagination*, Alex F. Osborn, Scribner's Year Published, ISBN 0930222933

*Art of Creative Thinking, The*, Robert W. Olsen, Perennial Library, ISBN 0060970510

*Book of Stress Survival, The*, Alix Kirsta, Thorsons, UK, ISBN 0722525923

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*Creating Workforce Innovation*, Michael Morgan, Business & Professional Publishing, Chatswood, Australia, ISBN 1875680020

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*Teach Your Child How to Think*, Edward de Bono, Penguin, London, ISBN 0670830135

*Thinkertoys*, Michael Michalko, Ten Speed Press, Berkeley, USA, ISBN 0898154081

*Use Your Head*, Tony Buzan, BBC Books, London, ISBN 056337103X

*Use Your Memory*, Tony Buzan, BBC Books, London, ISBN 0563371021

*What Is Total Quality Control? the Japanese Way*, Kaoru Ishikawa, Prentice Hall Trade, ISBN 0139524339

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