

Managing Difficult Conversations: Quick Reference Guide

About this guide

This quick reference guide is designed to help you have more successful conversations, especially when they are challenging or difficult – the ones you’d rather avoid.

Should I Bother Having a Discussion?

People often ask themselves if it’s worth having a difficult conversation. In general you have four choices:

- Address it directly - talk it over as soon as possible – initiate a conversation
- Address it indirectly - talk about it with your boss, a mentor, or an influencer
- Leave the relationship – simply sever contact with the other party
- Do Nothing – lump it and just accept the situation

The bottom line is: trust your instincts. If you think you need to have a conversation, then have the conversation.

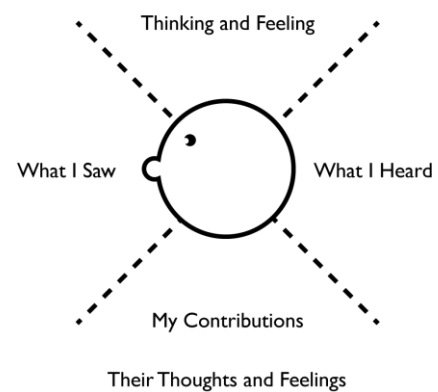
Preparing

Once you’ve decided to go ahead, spend time preparing in order to get the best possible outcome.

Do Your Homework

Before going into the conversation, here are some things to consider:

1. **Envision a desired outcome:** Think about what you want out of the conversation. What would be the best possible outcome? How will things be different as a result? How will you know if things have really changed?
2. **Capture observable data:** We can climb up the ladder of inference very quickly. Ask yourself what assumptions you’re making about the other person’s intentions. While you may be feeling disrespected, or belittled, be careful about assuming the other person meant to make you feel that way. Recall what you saw and heard as objectively as possible.



Empathy Map

3. **Your thoughts and feelings:** Using an Empathy Map (see attached worksheet) and review your earlier conversations. Write down your thoughts and how you felt in the moment. Ask yourself why you didn't speak up, say certain things, or why you were feeling the way you were at the time.
4. **Take a walk in their shoes:** Think about how they might have felt, what they might not have said. What might you have done to make them feel or say certain things? Consider things you may have done to contribute to the current situation. Have you avoided the person, made yourself unavailable, acted in a way that could be considered antagonistic? Consider different scenarios that could explain what's going on.
5. **Develop a 3rd Story:** Think about the situation as though you are a mediator with no stake in the result. By stepping back from your story, and theirs, you will be in a much better position to state the facts as you understand them. A good 3rd Story will also help you see how you may have contributed to the situation and how you may have made the other party feel. Start by following your empathy map: "When I <saw/heard> you do <something factual>, it made me <think/feel>. Now it's possible <my contribution> made the situation worse, but I'd like to understand better what you were thinking and feeling at the time." And put a period on it!

That said, there is no hard and fast formula for the 3rd Story, but it is based on the homework in the preceding section. You can write it down, draw a picture, record a video, whatever works for you. Before you meet, practice it by yourself and with a coach, peer consultant, or friend. Note: this is your version of the story. During the conversation you will improve the story by finding out the other person's perspective.

Holding the Conversation

6 Steps to a Successful Outcome

The majority of the work in any difficult conversation is work you do on yourself. No matter how well the conversation begins, you'll need to stay in charge of yourself, your goals and your emotions. Breathe, calm yourself, and keep focused on your outcome. At the same time you will need to be responsive to the other party and their emotional state.

Check in on your attitude toward the conversation – is it influencing your perception of it? If you think it is going to be terribly difficult, it probably will be. Focusing on a positive outcome will help you approach it much more confidently.

Step #1: Opening

State your reasons for calling the meeting. From your 3rd Story focus on what actually happened, what you heard and saw, how you felt. Don't ramble – put a period on it. At the end of this guide is a list of opening lines to help you get started.

Remember, the tone of your voice and your body language communicates far more about your attitude than your words. Stay positive – you want the best possible results. The following steps will help guide you.

Useful opening lines:

- I have something I'd like to discuss with you that I think will help us work together more effectively.
- I'd like to talk about [...] with you, but first I'd like to get your point of view.
- I need your help with what just happened. Do you have a few minutes to talk?
- I need your help with something. Can we talk about it (soon)? If the person says, "Sure, let me get back to you," be sure and follow up with them.
- I think we have different perceptions about [...]. I'd like to hear your thinking on this.
- I'd like to talk about [...]. I think we may have different ideas about how to [...]
- I'd like to see if we might reach a better understanding about [...]. I really want to hear your feelings about this and share my perspective as well.

Step #2: Inquiry

The first step is to seek understanding and to learn as much as possible about the other party's point of view. Pretend you're the mediator seeking to better understand both sides of the argument. Set your emotions to one side. The other party may be feeling hurt, angry, or scared, and it's up to you to make them feel relaxed enough to not only listen, but eventually start solving the problem creatively.

Let the other party talk until they are finished. Don't interrupt except to acknowledge. Watch for unspoken energy. Observe their body language and listen to the tone of their voice. What do they really want? What are they not saying? How is their attitude? Whatever you hear don't take it personally. It's not really about you. Your goal is to learn as much as you can at this stage of the conversation. You will have a chance to advocate, but this step is about inquiry and hearing the other party's point of view.

Step #3: Acknowledgment

Acknowledgment is demonstrating that you've listened and, by playing back what you heard in your own words, understand what the other person said. Be sure to clarify things if you're unsure – a big part of this process is gaining transparency.

Acknowledge whatever you can. For example, if you start to feel defensive then acknowledge it. You might say something like, 'I notice I'm becoming defensive, and I think it's because your voice just got louder and sounded angry. I just want to talk about this topic. I'm not trying to persuade you in either direction.'

Nevertheless, acknowledgment is not agreement. By saying, "that sounds very important to you," it doesn't mean you agree with their position – just that you are beginning to appreciate it.

Your goal is to understand the other person's position so well you can make their argument for them. When the time is right (you'll know) summarize what you heard and what your understanding of their position is. It's perfectly okay to try and intuit their desired outcomes and honor their position, in fact it's a great way to test for understanding.

Step #4: Advocacy

When you sense the other party has run out of energy on the topic, it's your turn. Talk about what you see from your perspective that they might have missed. Help clarify your position without minimizing theirs. For example: "From what you've told me, I can see how you came to the conclusion that I'm not a team player. I think I am. When I highlight problems with the project, I'm concerned about its long-term success. Perhaps I sound like a critic, but I don't mean to. Can we talk about how to address these issues so that my intentions are clear?"

If at this step the conversation becomes adversarial, loop back to inquiry. You may have to loop through the steps several times until you've cleared the air. Inquiry is a great way of keeping people engaged, but if you do loop back there don't skip over advocacy as you head towards problem solving – a successful outcome is one you both agree on.

Sometimes you have to take a deeper dive into advocacy. In situations where you're going to have to say 'NO' to someone's request or their bad behavior, for example, spending a little time on figuring out your 'Positive NO' can help you advocate more clearly. If this sounds like your situation, check out the overview in the next section.

Step #5: Shared 3rd Story

At the end of this step the 3rd Story should now be much richer and more reflective of both sides of the problem. Gain agreement on a shared story that includes how they felt and what they were thinking. Once you have a shared understanding of the situation, you're ready to start developing solutions. If all is going well you will both be on the same track.

Step #6: Action Plan

The British chess grandmaster Nigel Short once posited, 'Surely, serious problems can't be solved just by talking about them.' No, they can't, it also takes action.

Ask the other party what they think might improve things. If they have an answer, great! Find something you like and build on it. If they're unsure, introduce a solution and test it with them, ask: 'would you consider trying this and seeing if it works?' This is where your preparation can really help. Plus, you're looking for willingness to change, to work towards a better outcome.

It helps to identify if the issue is one of motivation or ability, or both. People may lack motivation if they don't know what they're doing. If they're motivated, then get them some training. On the other hand, if they know what they're doing and aren't enjoying it, there may be better uses for their skills elsewhere in the organization.

If your conversation resulted in agreement and a conclusion, then commit to following up in a few weeks to see if the agreement is sticking. If you made an action plan, be clear about who is going to do what and what the timeline is. Then keep to your agreed schedule. Note: if one person walks out of the meeting with all the action items it's an indicator that the other party hasn't accepted a role in fixing the problem, significantly lowering the likelihood of success.

Lasting change most often comes through understanding – there's just no guarantee that it will happen. You can't control the other person's response, so don't try. No matter how well you have prepared and how persuasive you may be, the decision to change is theirs – just as it is yours.

Tips: What You Might Say

When	You might say
Strong views are expressed without reasoning or explanations	You may be right, but I'd like to understand more. What leads you to believe...?
The discussion goes off on an apparent tangent...	I'm unclear how that connects to what we've been saying. Can you say how you see it as relevant?
You doubt the relevance of your own thoughts...	This may not be relevant now. If so, let me know and I will wait...
Two members pursue a topic at length while others observe...	I'd like to give my reaction to what you two have said so far, and then see what you and others think.
Several views are advocated at once...	We now have several ideas on the table [list them]. I suggest we address them one at a time.
You perceive a negative reaction in others...	When you said [give illustration]...I had the feeling that you were feeling [fill in emotion]. If so, I'd like to understand what upset you. Is there something I've said or done?
You perceive a negative reaction in yourself...	This may be more my problem than yours, but when you said [give illustration]...I felt... Am I misunderstanding what you said or intended?
Others appear uninfluenceable...	Is there anything that I can say or do that would convince you otherwise?

Practice, Coaching, Learning

As with any new skill, practice makes all the difference. Find a coach or mentor to help you through the process. Talk with folks you think are good at handling difficult conversations and seek their advice. Be willing to share with others what you've learned and what's worked for you in a given situation. Here are some additional tips:

Tips and Suggestions:

- Have your feelings (or they will have you). Don't minimize your feelings, but don't be in thrall to them either.

- If there are legal, human resources or other issues, be sure of your policies before proceeding.
- Don't be afraid to ask a third party to join you, but be sure to check with the other party first! You don't want to make them feel like they're being ganged up on.
- Acknowledge emotional energy - yours and the other party's - and direct it towards a useful purpose.
- When things get difficult focus on your goals and desired outcome(s).
- Reframe issues in order to convert negative energy into positive energy.
- What if you're verbally attacked?
 - a. Don't take verbal attacks personally. If you feel attacked, take a breath, acknowledge it and seek understanding through inquiry.
 - b. If you are attacked - don't simply roll over and yield. Yielding only rewards the other person's abusive behavior, while counter-attacking only reinforces it. Keep focused on what matters to you.
 - c. Note: If there's risk of physical attack – don't engage! Seek assistance.
- Don't assume the other party can see things from your point of view. They may not have spent the time you have thinking about the situation.
- Walk through your 3rd Story and the conversation with your peer coach or a friend, before having the real one.

Useful References:

- **Difficult Conversations: How to Discuss What Matters Most.** by Stone, Patton and Heen. Penguin, 2010
- **Crucial Conversations: Tools for Talking When Stakes are High.** by Kerry Patterson, McGraw-Hill, 2nd Ed., 2011
- **Getting to Yes: Negotiating Agreement Without Giving In.** by Fisher, Ury, and Patton. Penguin Books, 2011
- **The Fifth Discipline Fieldbook: Strategies and Tools for Building a Learning Organization.** by Senge, Roberts, Ross, Smith, and Kelner. 2009. Crown Business, 1994
- **The Power of a Positive No, How to Say No and Still Get to Yes.** by William Ury, Bantam Books, 2007
- **A Theory of Human Motivation.** by Abraham H Maslow - Psychological Review Vol 50 No 4 July 1943

Difficult Conversations Worksheet

Desired Outcome

What is the best possible result? What do I really want to have happen? How will things be different as a result? How will you know things have really changed?

Observable Facts & Empathy Map

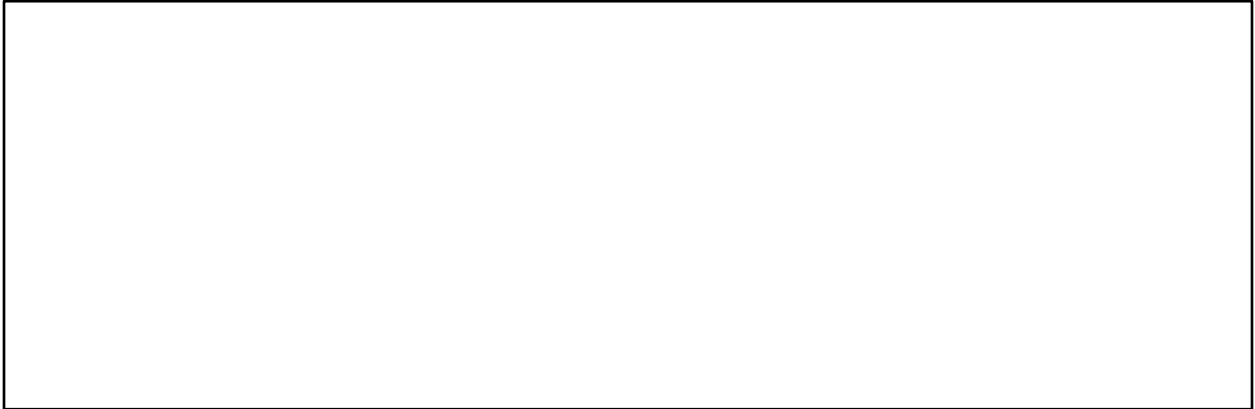
What assumptions are you making about the other person's intentions? What makes you believe those assumptions are true?

First write down what you saw and heard as objectively as you can. Next try to capture your thoughts and feelings at the time. Then think about how they might have felt, what they might not have said. What might you have done to make them feel or say certain things?

What I saw	
What I heard	
What I was thinking and feeling	
What I guess they were thinking and feeling	
What I might have contributed to this situation?	

Attitude

How do I feel about the conversation? How is it influencing my perception of it? What will make it more positive for me?



The 3rd Story

If I were a mediator with both perspectives, how would I summarize this situation?

