EFFECTIVE DIFFICULT CONVERSATIONS

A Step-by-Step Guide

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INTRODUCTION

WE'VE ALL BEEN THERE.

At some point in our work life, whether as a new employee or as someone who is coming up to their twenty-five-year anniversary, we have all confronted that most dreaded of situations: the "difficult" conversation. Examples from all rungs of the organization ladder are numerous. We take on a new leadership position and discover that the previous person in that position did not deal with certain personnel issues, that is, did not want to have those "difficult" conversations. In addition, we might find in our new leadership position people who are not fulfilling the requirements of their positions, or others who are regularly negative or who bully people, and still others who are frequently late for their shift.

Then there are others of us who are not in leadership positions, but "difficult" conversations still loom on the horizon like a dreaded black cloud. For example, one of our colleagues is consistently humming or singing to themselves down the hallway; or another colleague has sent us an angry e-mail in response to something we said or did, which was not at all intended to offend, but offense was taken nevertheless. In order to keep on working with this person, you will need to clear up this misunderstanding, that is, have a "difficult" conversation.

We are confronted with "difficult" conversations everywhere. It is bad enough that we have these conversations in our personal life, but we probably need to have as many if not more in our work life. And unlike in our personal life, most of these conversations will have to be with people we may not particularly like and who might not like us. So what is a person to do?

Whether you are conflict-avoidant and terrified of having a "difficult" conversation or think of yourself as someone who can be blunt and "tell it like it is," this book has something to offer you. A successful and professional leader is one who is capable of managing all of the situations described above in a manner that is both compassionate and direct in order to create an effective conversation and a working solution, that is, an effective “difficult” conversation. This book will focus on having effective “difficult” conversations in your work life. It is not a self-help book, and it makes no claims to be able to solve all problems, either professional or personal. Some of the ideas and concepts presented here may sound familiar if you have already read other books dealing with this subject, especially books designed to make you a better listener using techniques of “active listening” and other aspects of good communication behaviors. However, it is our hope that this book will bring something new to the discussion while focusing on having “difficult” conversations in your professional life. The examples and settings will come from relatable work experiences and, in the end, it is our hope that your work life will become a little less stressful and a little more successful.

We frequently offer ourselves excuses for not dealing with personnel issues: since tenured colleagues cannot be easily fired, and unionized workers cannot be easily disciplined, why bother doing anything at all? Alternatively, maybe we say to ourselves, “It is necessary to go along to get along.” Perhaps the excuse is as simple as “don’t rock the boat,” and it is easier just to maintain the status quo. However, these excuses are just that: excuses for not being the successful, dynamic, compassionate, and courageous professionals that we are meant to be. We hope that this book will help you achieve the level of courage needed to face each of these situations and many more.

To begin, it is necessary to define what we mean by a “difficult” conversation, and explain why, up until now, there have been quotation marks around the word “difficult.” Unfortunately, the idea of what is a “difficult” conversation is not easily answered, which is why the entire first chapter of this book is devoted to defining a “difficult” conversation. As mentioned above, a difficult conversation is different for a conflict-avoidant person than for someone who likes to “tell it like it is.” However, in both instances, as well as many others, there are some commonalities, which we discuss and highlight in chapter 1, as well as throughout the rest of the book. Suffice it to say, defining what is a difficult conversation is only the beginning of the discussion. The remaining chapters go on to discuss all aspects of your work life and how to make it more successful and more enjoyable.

Chapters 2, 3, and 4 focus on preparation. Thorough preparation is critical to having effective difficult conversations. Initially you might read these chapters and find yourself a little overwhelmed by the amount of time and attention devoted to preparation. This is purposeful. We think it is important that you understand the kind of work that goes into preparing for a difficult conversation. We also reassure you that over time some of these steps will become instinctual and the amount of time that you spend preparing for a difficult conversation will lessen, somewhat.

In chapter 2 we take the first of three steps in preparing for a difficult conversation: getting clear. Therefore, in order to have an effective difficult conversation, you need to self-reflect: this entails looking at yourself, the other person, and the situation with an objective, dispassionate, and thoughtful eye. Getting clear and being objective, thoughtful, and dispassionate about the other person and the situation are a necessary first step to having a productive difficult conversation. We discuss the practical aspects of whether this is a conversation you need to have, and how and when you need to have it.

In chapter 3 we discuss the next step in preparing for a difficult conversation: gathering any resources that might be helpful. The sole purpose of gathering resources is to make sure that the facts you have about the situation are as complete and accurate as possible. Our experience has taught us that giving insufficient attention to this step in the preparation process can result in ineffective difficult conversations. If you get the facts of the situation incorrect, you may spend a majority of the conversation debating your version of the situation versus the other person's version. This chapter describes the printed and human resources that might be helpful to consult before scheduling a difficult conversation.

In chapter 4 we discuss the last step in preparing for a difficult conversation: clarifying your message. Every productive difficult conversation is guided by a clear message that you need the other person to hear and understand. In this chapter we help you articulate a clear, succinct, direct, and compassionate message that you can use to guide a difficult conversation.

In chapter 5 we focus on the heart of the conversation. After carefully preparing for the conversation, it is equally important to consider what you will say during the conversation and, even more importantly, when and how you will respond to what the other person says.

In chapter 6 we give you the tools to hold yourself and others accountable. It all comes down to documentation: without documentation, it will be as if the conversation never happened; and considering the amount of time you have already given this process, you want to make sure that work turns into positive action. We call this next step "Write It Down." And this step is crucial to a difficult conversation's ultimate success.

In chapter 7 we encourage you to keep up regular meetings and continue to write up the results of those meetings. We title it "Keep up the Good Work," which probably says it all.

We address the issue of having difficult conversations with coworkers in chapter 8. There are unique aspects to these conversations that required a separate chapter to adjust the steps to manage the special relationship between coworkers.

In chapter 9 we use the tools described in earlier chapters in the context of change management. Learning how to help people through strategic planning and reorganization is imperative to a successful reorganization or change, and will most likely require many difficult conversations.

In chapter 10 we talk about a very important category of difficult conversations: those that are initiated by an employee who needs to talk to their supervisor about any number of issues, such as asking for a pay raise, a promotion, a new job assignment, or voicing concerns about management decisions that affect work assignments. We call it "Managing Up—How to Have Difficult Conversations with Your Boss."

Finally, we offer you our conclusion and some final thoughts. However, one important item of note is that both authors have botched most of the difficult conversations they had at the beginning of their supervisory careers. It was the recognition of this failure and a true desire to be successful leaders that led both of them in different institutions to develop methods for effective difficult conversations. Once you have identified an area where you need to improve, we recommend that you dive into that area with enthusiasm, read every article and book you can find on the topic, consult with others in similar positions, and begin to implement small improvements. This book is the result of both of us tackling an area where we admitted failure. It is also a reflection of the courage to admit that failure, and a documentation of our resilience.

Ultimately, this book provides you with step-by-step instructions on having difficult conversations, particularly in the workplace. We use real examples from our experiences as leaders in libraries and in higher education to illuminate the instructions, along with opportunities for you to reflect on your own situations. We know that by following these steps, you will gain confidence, courage, and a sense of integrity. We wish you great success as you approach each situation and we hope there will be a day when you no longer dread these conversations but look at them as new opportunities to learn more about yourself and how others see themselves in the world. It's an exciting and fascinating journey!

CHAPTER ONE

Difficult Conversations Defined

IN THIS CHAPTER WE DEFINE DIFFICULT CONVERSATIONS AND discuss what makes them difficult. We give you encouragement to have these conversations despite any hesitancy you might have. And if you are a person who jumps into these conversations without much thought, we encourage reflection to make these conversations effective. You are about to begin an exciting journey.

DEFINITION

The key word in the term *difficult conversation* is “difficult.” What is a “difficult” conversation? That depends entirely on the individual. For a person who is conflict-avoidant, for example, a difficult conversation is any conversation that you have anxiety about, that worries you, or that you have put off, and where you are pretty certain the other person will not like what you are about to say. On the other hand, for a person who might be a “tell it like it is" person, a straight shooter who is not afraid to confront people, a difficult conversation may become one in which, after "telling it like it is," the other person becomes hostile, combative, or worse. What was a difficult conversation, entered into without reflection, has now turned into a difficult situation with a "difficult" employee, and it may only go downhill from there.

Thus, what is difficult is in the eye of the beholder, or rather, the mouth of the speaker. However, some generalizations and common examples can be given. For the authors, typical difficult conversations include the following.

💬 Telling someone they will not be rehired or they did not get the promotion they applied for.

Hiring, firing, and promoting employees are among the core elements of many leaders' portfolios. Hiring and promoting can be rewarding and even pleasurable conversations to have; and firing or denying promotions can be among the most difficult. Unfortunately, our jobs are filled with the give-and-take of this hiring cycle, and so thinking about how to manage the less pleasurable conversations is important.

There are many reasons why a leader might have to let someone go. When grant funding for a position ends and there are no other funds to continue the position, we have to let people go. This is an unfortunate reality of grant-funded projects. Back in 2008 and 2009, when the bottom dropped out of the American economy, many libraries faced major budget cuts that resulted in people losing their jobs. Sometimes we have to let people go because they are not performing their job adequately. Often the decision to let someone go happens after a long series of difficult conversations; if you have followed the advice given in chapter 6 this final difficult conversation will be made a little easier because it will not come as a complete shock to the employee. But if you have not been consistent about having frequent conversations and creating documentation, then letting someone go can be a terribly difficult process. These are conversations that have a huge impact on the lives of those with whom we work and are truly among the most difficult conversations we will have.

Similarly, telling someone that they did not get a promotion or a position they applied for will also prove to be a difficult conversation. Often people who have applied for a promotion have worked with you in the unit for quite some time. The employee may have become a personal friend and trusted colleague. In these instances, difficult conversations have an added layer of personal complication that must be considered.

Both of us have had the responsibility of letting someone go and each conversation was as unique as the circumstances. Letting go of a very popular teacher resulted in a large group of angry students descending on the chair of the department's office. Informing a staff member that the funds supporting her position would not be renewed brought tears and a few slammed doors. These are the realities of doing leadership in an academic environment.

Telling someone they are not performing adequately.

Like hiring, firing and promoting, performance reviews are a regular part of a leader's job. In many libraries and other academic units, we are expected to conduct performance reviews on an annual basis. We would like to report that their regularity makes them easier but that would not be true. For most of us, these conversations are especially difficult precisely because of their regularity and because we are conducting them with people that we may have come to know quite well.

Negative performance reviews are especially tricky because the task is to clearly identify the behavior that needs to be changed while also motivating the employee to stay engaged and be willing to improve. Hiring new employees is almost always more expensive and time-consuming than training and supporting the employees currently on staff. So finding a way to conduct this conversation effectively is critical to your success as a leader.

These conversations can be especially difficult if the other person believes they are doing an excellent job. However, avoiding telling someone that they are not meeting expectations is both unkind and unfair. How can anyone improve their performance unless we tell them that they are not meeting expectations? While you can put off having the difficult conversation, wait until their yearly review, and then surprise them with a poor performance review, that practice would be highly discouraged by any Human Resources professional. It is unfair and unkind not to help them improve before the year-end review simply because you want to avoid a difficult conversation. Furthermore, ignoring the poor performance of employees can affect the morale of those performing well. It can be demoralizing to work hard every day only to see others making a minimal effort with minimal or no consequences.

You will read several examples of performance reviews that went well and some that went poorly. These are probably some of the more frequent conversations you will have.

Telling someone you need them to do something they don't want to do, or telling someone you need them to stop doing something that they like to do or feel entitled to do.

These types of conversations may be less formal in terms of institutional norms but they are no less difficult. Especially in academic settings like libraries, most of us have benefited from the opportunity to "own" our jobs and "make them our own." This privilege can make working in an academic setting rewarding. Unfortunately, sometimes we forget that this opportunity to create our own work is a privilege and not a right. We often forget, as well, that all working situations change; new tasks get assigned and new technologies demand that old tasks be done in new ways. Redirecting people's work is a common, if less formal, aspect of a leader's job.

These two situations are one of the few that apply equally to managers and coworkers. Managers are often faced with the unenviable task of telling someone to do something or to stop doing something. These conversations are inherently difficult because, by definition, the person you are telling to change may not immediately want to hear it. So whether you, the manager, are conflict-avoidant or someone who does not hesitate to tell it like it is, if not handled with some level of reflection and planning this conversation is not likely to go well. Similarly, an employee on any level in the organization may need to have a difficult conversation with a coworker who is doing something you would like them to stop doing, like interrupting you when you are trying to work; or asking them to do something they don't want to do, like closing their office door when they take a phone call.

We have had the experiences of telling a colleague they will no longer be fulfilling an administrative role as well as asking someone to teach a class on a day or time outside of their usual teaching schedule. These conversations are essential to the efficient functioning of a unit and they are often quite complicated.

COMPONENTS OF A DIFFICULT CONVERSATION

There are a number of reasons why we might hesitate to have a difficult conversation. Many of us just simply do not like conflict in any form and would prefer not to hold any conversation where the other person might not like what we have to say. We have been calling this type of person "conflict-avoidant."

Below are some common reasons why someone who is conflict-avoidant might consider a conversation “difficult.” These are also some common reasons, especially the last one, why someone who doesn’t mind confronting people and “telling it like it is” might hesitate because they could turn a blunt conversation into a difficult situation.

The other person might react badly (anger, emotion, tears, retribution).

People, being humans, react to information that they don’t want to hear with a wide range of emotions. We’ve heard stories of managers who were cursed at in a very loud voice by a colleague after the latter had learned that his tenure case received a negative vote. And we’ve heard stories of colleagues attempting to build coalitions against the supervisor when a merit review didn’t result in the raise they’d hoped for. It is true that these difficult conversations can result in heated emotions expressed without restraint; but it is also true that often the fears are worse than the realities. These reactions from the other person are awkward at best and frightening at worst. Using the process outlined in this book can reduce these reactions significantly.

You might be rejected (by the individual and their friends).

Let’s be honest, none of us likes to be rejected, and most of us want to be accepted and loved. Risking rejection is something most of us avoid at all costs. It is also true, however, that being a leader means that occasionally you will have to risk rejection.

One of the most important things to learn is that as a leader you will be required to regard your friendships differently. As a supervisor or as a coworker you still need to work with people, and their friends, with whom you will have to have difficult conversations. You may need something from them in the future, or you may just not want them to shun you in day-to-day interactions. These are natural fears and they must be managed. You will be called to treat your friends as employees, even when that is very difficult.

You might do it badly and make things worse.

Even for a person who is ready to enter into conflict, this concern is a very real one. As you will read in the next section, there are high stakes involved in hosting a difficult conversation and the consequences and impact of an *ineffective* difficult conversation are very real. The consequences can range from a lawsuit to lost trust and maybe some banged-up furniture. Having a plan to address a difficult conversation will do a lot to reduce this particular concern whether you are conflict-avoidant or not.

THE BAD NEWS AND THE GOOD NEWS

While we are thrilled to have the opportunity to share our thoughts on and experiences with having effective difficult conversations, we think it is very important to make one thing perfectly clear. *No matter what you do to prepare, these conversations are never easy and they can be terribly difficult.* As we have described earlier in this chapter, there is a lot at stake in these types of conversations. In fact, it is not hyperbolic to state that often these conversations are focused on the highest of stakes in our working relationships. Telling someone that grant funds have expired and they will not be rehired is tantamount to telling them that they will not be able to pay their rent or feed their children. Telling someone that they are not performing their tasks adequately is often heard as telling someone they are an inadequate human being. Very high stakes indeed! In fact, one of the authors was once told by a mentor that "the day you think these conversations are easy is probably the day that you should get out of administration." Wise words. Our recommendation is that you go into each difficult conversation assuming that the stakes are even higher than is evident on the surface.

The good news is that *these conversations can be prepared for.* That's why we are sharing this book with you. There is abundant evidence from research and experience that there is a set of practical steps and learnable skills that can be brought to bear on these conversations. Steps like adequate preparation, including extensive consultation, are quite important in the context of having effective difficult conversations. Steps like careful follow-up can ensure that effective difficult conversations result in desirable behavioral change and accountability for both the employee and yourself. Communication skills like listening and nonverbal immediacy and clear messages can go a long way toward making difficult conversations effective. We hope this book helps you plan for those steps and begin to build those skills. Like all skills, though, reflective practice is strongly advised.

The even better news is that these *conversations can be productive.* Difficult conversations can yield important behavior change. People that we supervise, armed with clear expectations and supported by clear and compassionate messages when those expectations are not met, can transform into model employees. Through difficult conversations we might learn what is keeping an employee from performing adequately and might be able to put supportive structures in place so that performance can meet expectations. Through difficult conversations we might discover alternative ways to support an individual whose grant funding has expired. There is much to be learned through a carefully navigated difficult conversation.

And the news gets even better. We believe, and our experience confirms, that by having these conversations *you will gain confidence, strength, and integrity*. A great irony of life as a manager is that avoiding difficult conversations makes the work much more difficult. Tasks don't get completed on time and at the right level of quality. People can be confused and unhappy, which can make for low morale. We believe, and the argument we hope this book helps us to make, that the difference between a minimally successful manager and a truly successful one is the capacity for having effective difficult conversations. We argue that you will be remembered and promoted not because you manage your budget well and meet deadlines, although these are very important, but because you help the people around you reach, and maybe exceed, their professional potential. Even though having these difficult conversations may never be easy, we believe that if you commit yourself to following the steps identified in this book and developing the communication skills we suggest, you will become confident in your abilities and feel satisfied that there is integrity in the way that you interact with those under your supervision.

ACTIVITY

Take a few minutes to think about a difficult conversation that you are facing.

- Write down the context and the facts about the situation. Write down as many details as come to mind. Who is involved? What do you know or feel about the person? What do you want this person to do or change? What do you need to tell them? What is their relationship to you? What are the unique parts of the overall situation that make it complicated?
- Write down your concerns about having the conversation and what might make you hesitate to have the conversation. Be explicit and thorough here.

We hope you will use the details that you have recorded here to apply the concepts that we present in the rest of the book. Doing that may help anchor your learning and prepare you to have this difficult conversation in an effective way.

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