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# Excellence in Client Encounters

Difficult Encounters

94

**A**

**B**

1 2 3 4 5

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## Homework

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- Review your notes, the book, etc.
- Find one learning point that you can relate to an experience
- Come to the next session prepared to explain this

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## Difficult Encounters

Guiding Discovery

*Finding the moss under hidden stones*

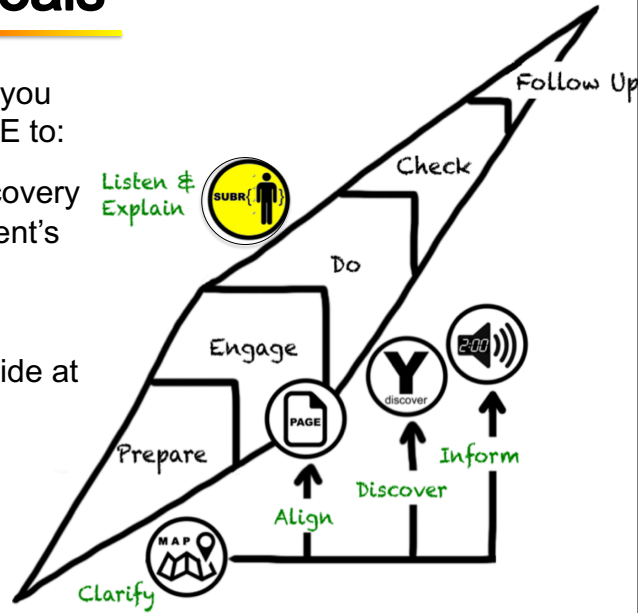
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# Purpose & Goals

This section will enable you to use the SUBROUTINE to:

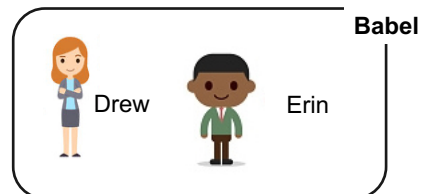
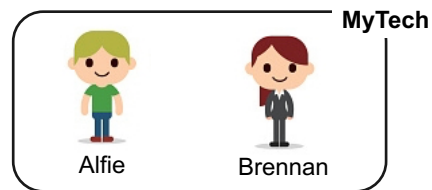
- Perform Guiding Discovery to find out about a client's deeper problems and needs ...
- ... to discover and guide at the same time



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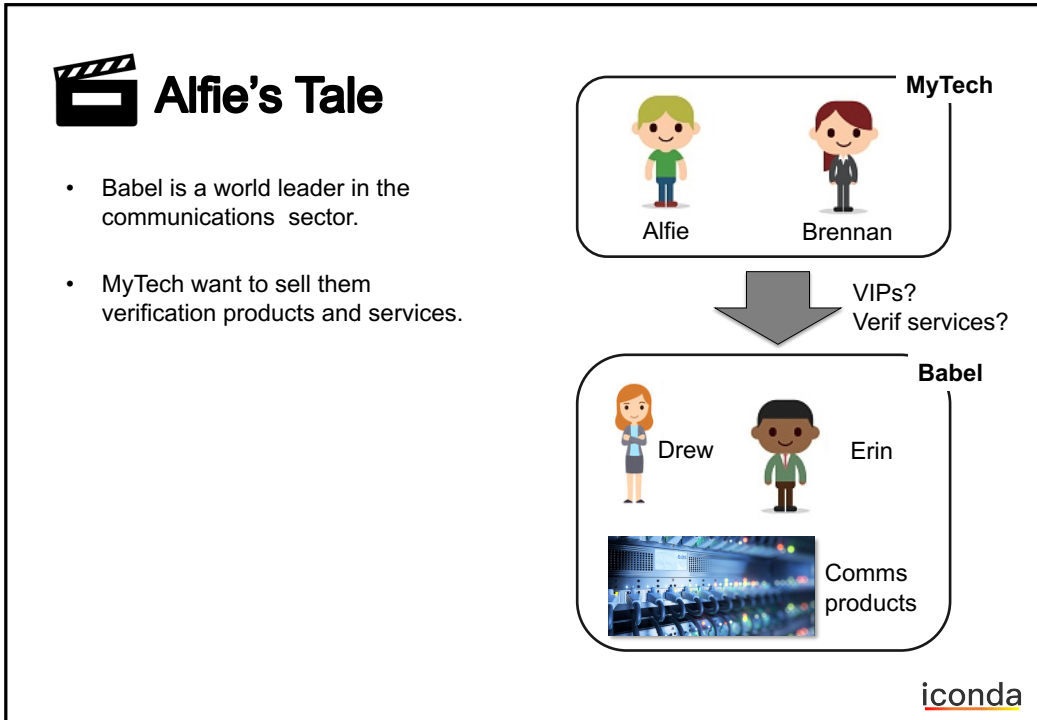
## Alfie's Tale

- A Blockbuster Film (we hope!)
  - An extraordinary adventure into the world of Client Encounters
  - Helping us learn through *observation* and *involvement*
- Short film scenes
  - We'll improvise around a single storyline
  - As many as we have time for
  - Each scene illustrates a different aspect of Client Encounters
    - But other things will certainly come up too !

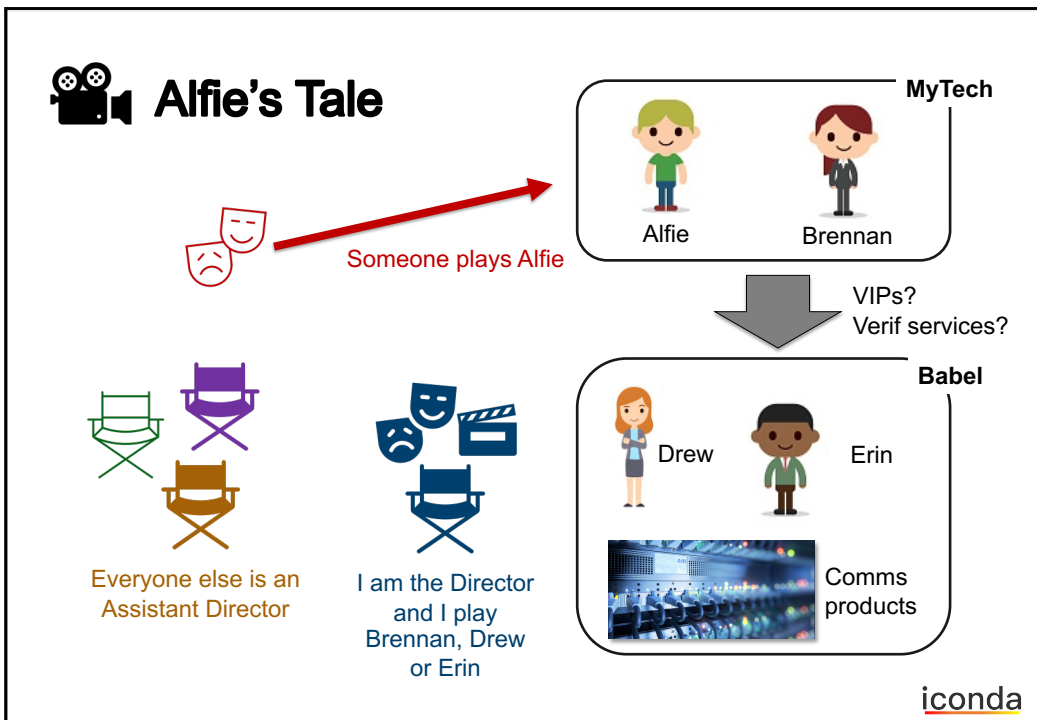


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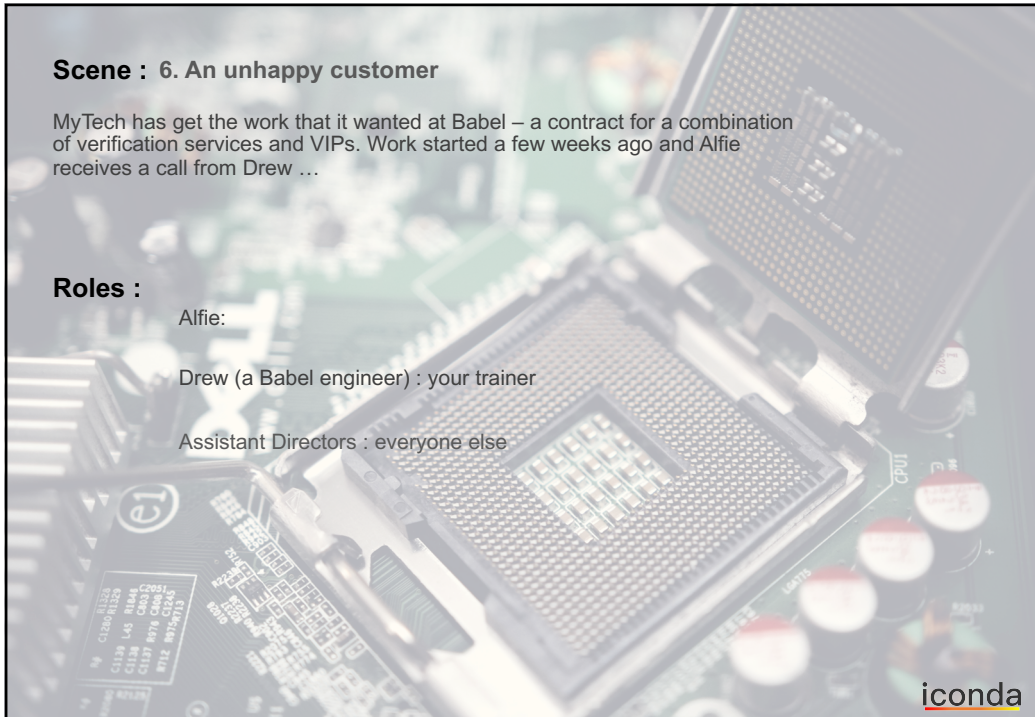
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**Scene : 6. An unhappy customer**

MyTech has get the work that it wanted at Babel – a contract for a combination of verification services and VIPs. Work started a few weeks ago and Alfie receives a call from Drew ...

**Roles :**

- Alfie:
- Drew (a Babel engineer) : your trainer
- Assistant Directors : everyone else



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## Limitations of Learning Discovery

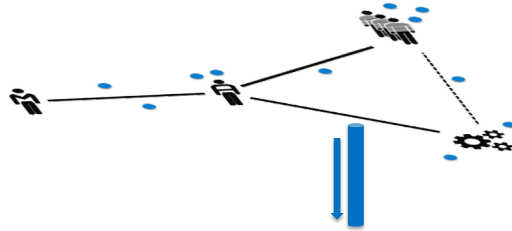
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- Asking questions won't work if the client can't answer them
  - The situation is complex/unclear?
  - They have difficulty disclosing certain information?
  - Other...?
- We often receive superficial/incomplete answers
  - Don't short-circuit by making suggestions straight away!
- « Quick and easy » has low value
  - Careful questioning augments the value of any proposed solution

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## Another Dimension to Discovery

Learning Discovery ensures good *coverage* of topics



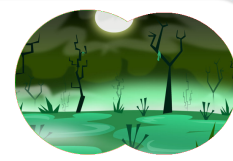
Guiding Discovery gives us more *depth* and *clarity*

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## Step 1: Recognise!

The situation is  
confused/fuzzy



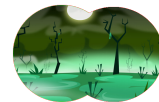
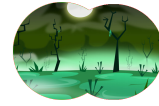
The client can see  
only problems

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## Examples

- “This machine is driving me nuts – it’s useless!”
- “Their packages are too complicated!”
- ...

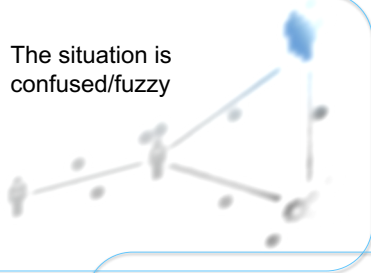


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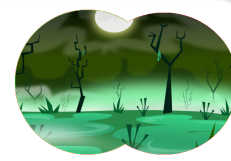
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## Step 1: Recognise!

The situation is  
confused/fuzzy



The Hurry Monster has everyone  
short-circuiting



The client can see  
only problems

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## Step 2: Aim!

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Decide what we're aiming for  
(the ***desired*** situation)

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## Examples

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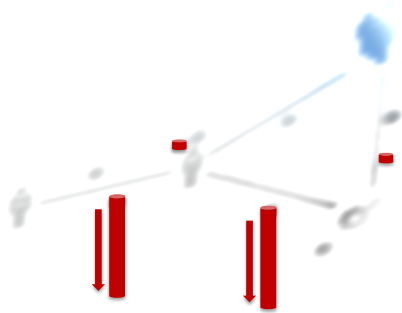
- ~~“This machine is driving me nuts — it’s useless!”~~
- “I want to finish these simulations this week, but ...”
- ~~“Their packages are too complicated!”~~
- “I’m trying to understand how to install ...”
- ...



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## Step 3: Explore!



**Choose** a point

**Guess** something

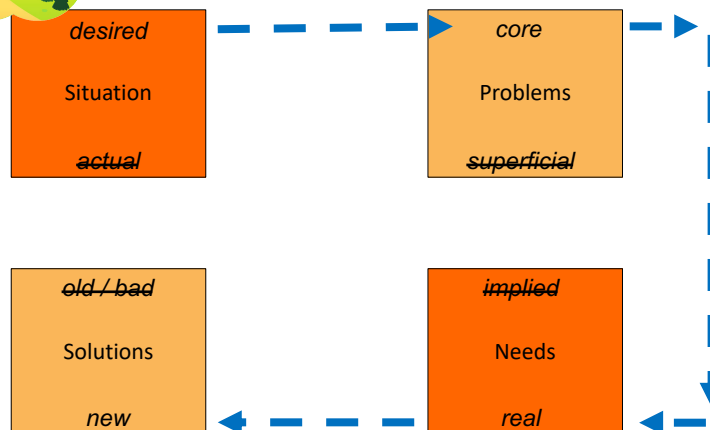
If something interesting comes up, **Dig Down!**

Repeat ...

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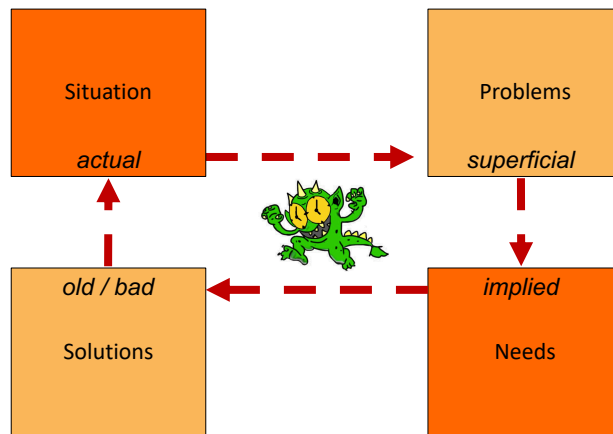
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## Step 4: Survey & Solve!



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## Short Circuit



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## Guiding Discovery

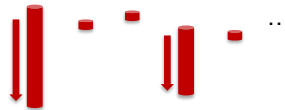
1. Recognise



2. Aim



3. Explore



4. Survey & Solve



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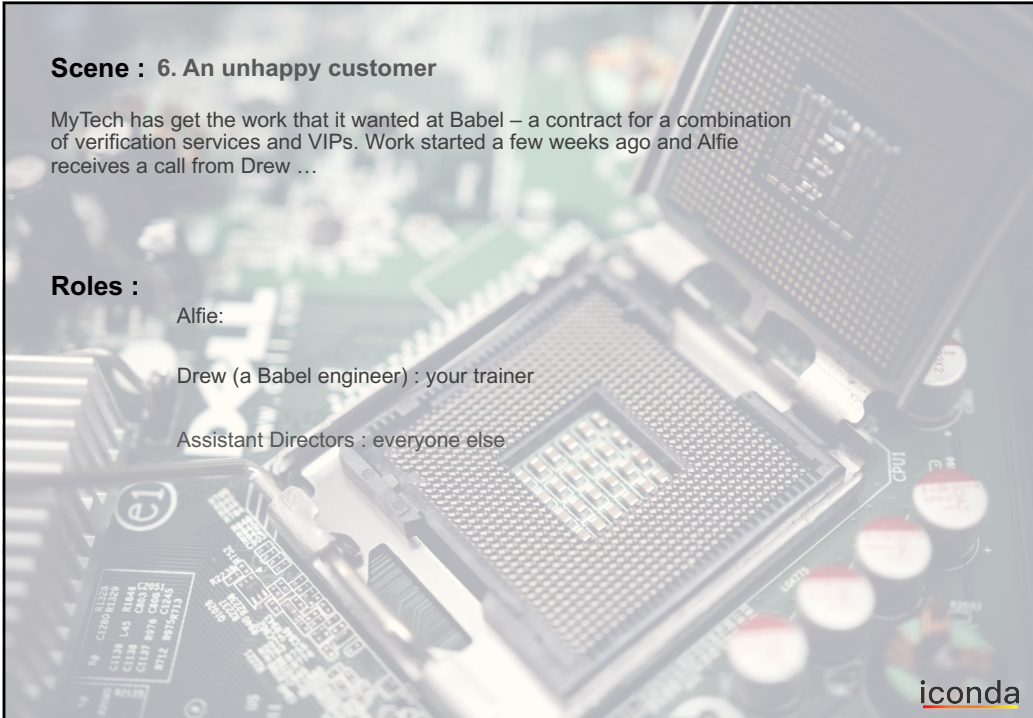


**Scene : 6. An unhappy customer**

MyTech has get the work that it wanted at Babel – a contract for a combination of verification services and VIPs. Work started a few weeks ago and Alfie receives a call from Drew ...

**Roles :**

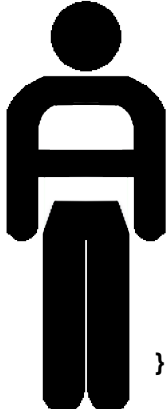
- Alfie:
- Drew (a Babel engineer) : your trainer
- Assistant Directors : everyone else



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## The SUBROUTINE for **DISCOVERY**



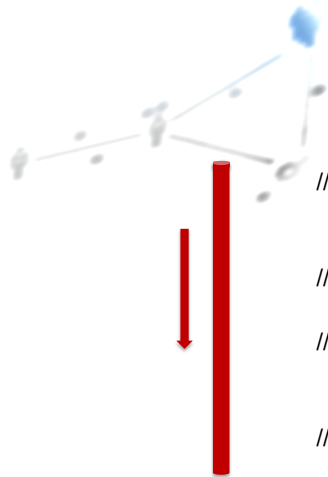
```

subr(#DISCOVER) {
  situation();           // What is observed? (separating facts from judgements,
                          // rules and suppositions)
  problems();          // How is this situation affecting my client?
  needs();             // What are the gaps? The client's unsatisfied needs /
                          // interests / requirements.
  solutions();        // What solutions have they tried in order to fulfil their
                          // needs?
}

```

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# Drilling down



// What is observed? (separating facts from judgements, rules and suppositions)

// How is this situation affecting my client?

// What are the gaps? The client's unsatisfied needs / interests / requirements.

// What solutions *have they tried* in order to fulfil their needs?

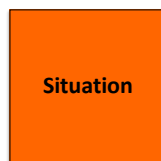
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## Key to the conversation: *always know which base you're on!*

What is observed?

Separating facts from judgements, rules and suppositions



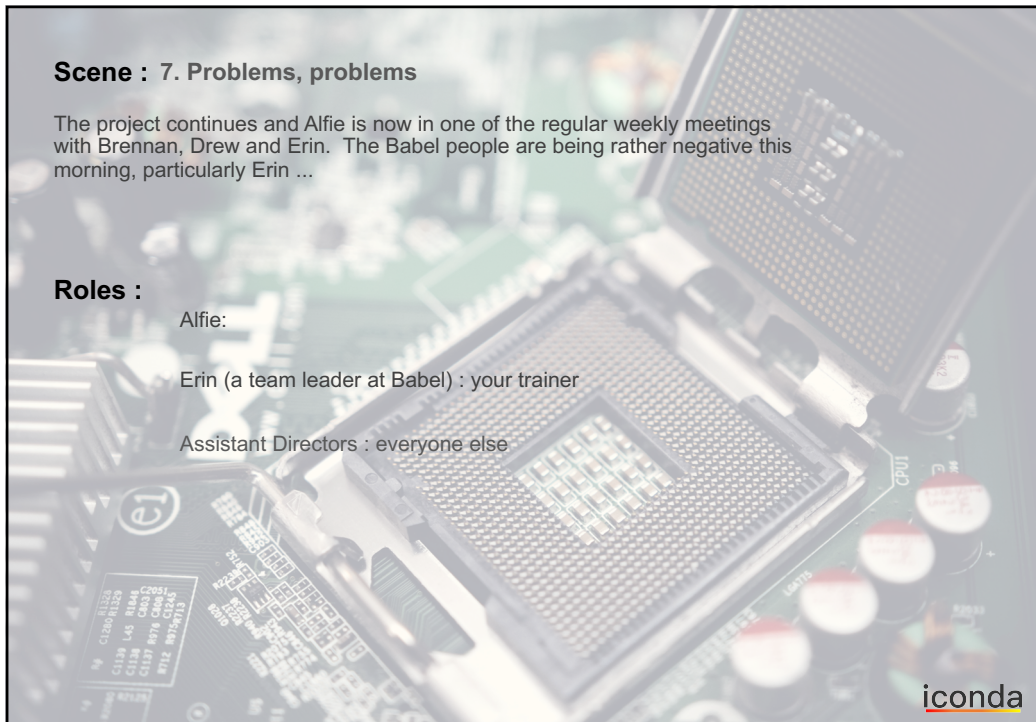
How is this situation affecting my client?

What have they already tried?

What are the gaps?

The client's unsatisfied needs / interests / requirements

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**Scene : 7. Problems, problems**

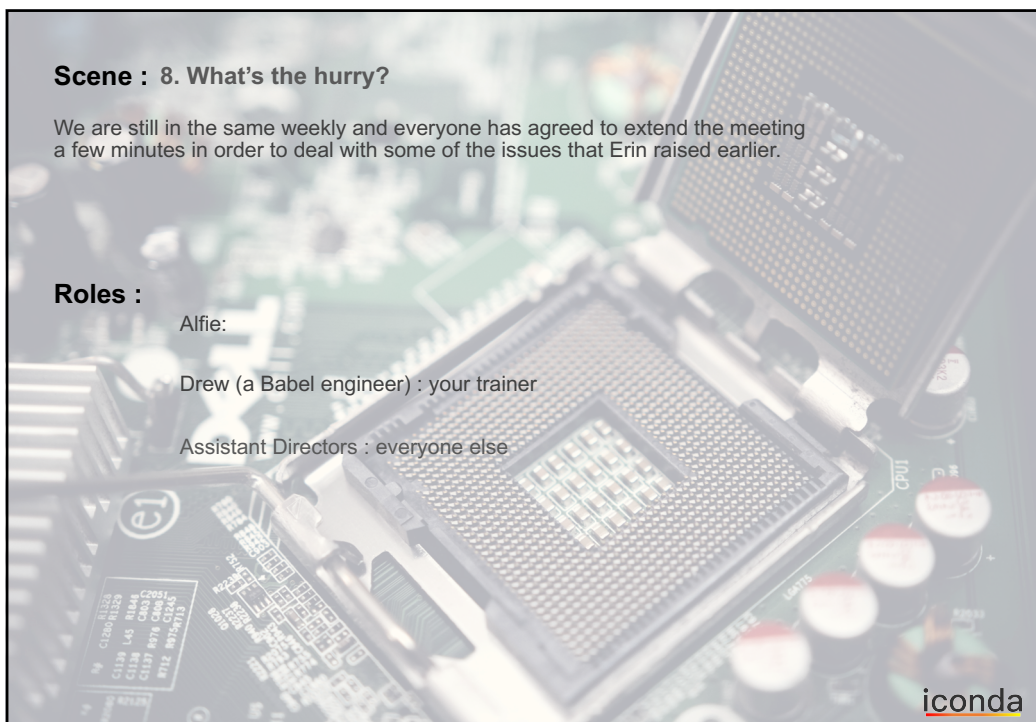
The project continues and Alfie is now in one of the regular weekly meetings with Brennan, Drew and Erin. The Babel people are being rather negative this morning, particularly Erin ...

**Roles :**

- Alfie:
- Erin (a team leader at Babel) : your trainer
- Assistant Directors : everyone else

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**Scene : 8. What's the hurry?**

We are still in the same weekly and everyone has agreed to extend the meeting a few minutes in order to deal with some of the issues that Erin raised earlier.

**Roles :**

- Alfie:
- Drew (a Babel engineer) : your trainer
- Assistant Directors : everyone else

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## Multiple choice

Comment	Situation	Problem	Need	Solution
I've been stuck on this bug for hours!				
I'm feeling pretty bad				
There was an accident				
That guy is wonderful!				
The plane was cancelled! I'll never make it in time!				
It crashes every 6 hours				
My cousin is an expert in this				
I don't like the way this project is run				



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## Multiple choice II

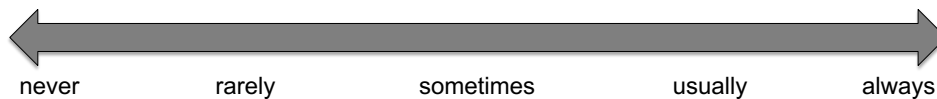
Stimulus	Response	Short Ckt	Learn'g Disc'y	Guiding Disc'y
I've been stuck on this bug for hours!	Try Google!			
I'm feeling pretty bad	You mean ill-bad or tired-bad or just in a bad mood ..?			
There was an accident	What sort of accident?			
That guy is wonderful!	I'll arrange for you to meet him!			
The plane was cancelled! I'll never make it in time!	And what would happen if you don't go? What's the purpose of the visit?			
It crashes every 6 hours	What have you tried to fix it?			
My cousin is an expert in this	What's his experience?			
I don't like the way this project is run	Is it that you'd you like to have more say in the way things are done? ...			



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## Learning Check

- Having found out about your client's situation, the next step is to discuss an action plan.
- A client will cooperate when you help him to clarify his problems and needs.



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## Learning and Guiding Discovery

- Learning Discovery is about **ASKING** the right questions
- Guiding Discovery involves **PROMPTING** the client to reveal deeper Problems and Needs
- Short Circuits happen when you **SUGGEST** Solutions too early



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# Difficult Encounters

Taking Control  
*Crucial Client Conversations*

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## Crossing the Line

My world  
(pro + perso)

Their world  
(pro + perso)

**Challenge**  
Persuade your opposite number to cross the line and enter your world

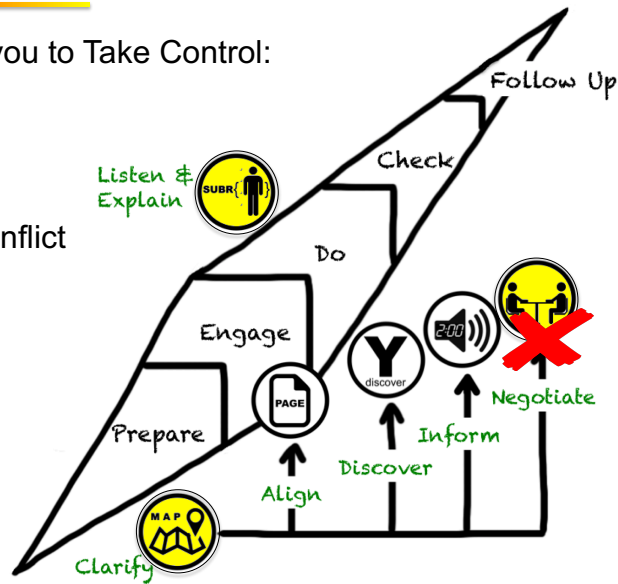
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## Purpose & Goals

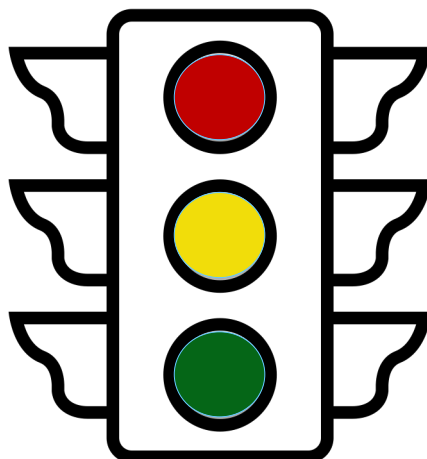
This module will enable you to Take Control:

- Presence
- Assertiveness
- Confronting without conflict



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## Client conversation types



**Difficult**  
emphasis: Taking Control

**Challenging**  
emphasis: Guiding Discovery

**Normal**  
emphasis: Learning Discovery

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## Take Control of What?

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- Consider a meeting of six people
  - Myself
  - A colleague
  - My boss
  - My opposite number (the engineer that I support)
  - Their colleague
  - Their boss

*What must I take control of?*

The outcome as far as it affects me personally and professionally

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## Example: Product Problem

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- I meet a client to discuss a product problem
- Outcome:
  - They agree to gather more data on the problem
  - I agree to run certain tests
  - We agree on a call in two day's time to assess progress

*Did I take control? (or maintain adequate control)*

- Yes, if this outcome is acceptable to me
- No, if I could see that the problem was on the client's side and I had felt like saying 'no' to their request for tests

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## Example: Information Problem

- A client asks me to present something
- Outcome:
  - I make a presentation
  - They thank me, saying that it has given them new ideas


*Did I take control? (or maintain adequate control)*

- Yes, if this outcome is acceptable to me
- No, if I needed information from the client on their needs and the alternatives under consideration (and they either ignored my requests for this, or I didn't even ask)

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## The SUBROUTINE for DISCOVERY



```

subr(#DISCOVER) {
  situation(); // What is observed? (separating reported facts from
                judgements, interpretations and generalisations)
  problems(); // How is this situation affecting my client? (identifying
                issues and their impact)
  needs(); // What are the client's 'satisfaction gaps'? (often called
              interests and requirements; not to be confused with
              requests for specific solutions)
  solutions(); // What solutions have they tried in order to fulfil their
                needs?
}

```

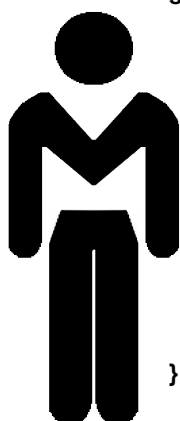
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## *When is **Assertive** Communication Needed?*

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## The SUBROUTINE to **ASSERT MYSELF**



```

subr(#ASSERT) {
  situation(); // My observations (avoiding judgements,
                // interpretations and generalisations)
  problems(); // How this affects me and my organisation
  needs();    // What I therefore need (at a high level of
                // abstraction)
  solutions(); // Actions that may fulfil these needs: a
                // request or a proposal for action
}

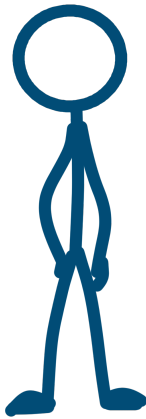
```

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## Aspect #1

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Observations

I start with observations, striving to be factual.

Why is this a good place to start?

What does a high-quality observation look like?

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## Why is “Observations” a good place to start?

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It's safer!

### 1. For them

*Facts* are less likely to trigger defensiveness than *interpretations*

### 2. For me

If the conversation could put me in *danger*, then I may recognise this before exposing myself unwisely



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# What does a high-quality Observation look like?

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**Facts, experiences**  
Numbers, descriptions, verifiable data

**Rules**  
"I must..."  
"It should..."  
"I can't..."  
"It's impossible..."



**Judgements**  
"It's important that..."  
"It took a long time..."  
"They're slow..."  
"It's good/bad/ugly..."  
"I am..."

**Suppositions**  
Assumptions  
Hypotheses  
Deductions  
Projections

*"Meta model", John  
Grinder and Richard  
Bandler*

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## Scene : 9. A difficult confrontation with the IT manager

Another weekly meeting, and Alfie raises some issues with IT.

It's something that Alfie has been worrying about and losing sleep over for a couple of weeks. Their patience with IT is wearing very thin.

### Roles :

Alfie:

Francis (the MyTech IT manager) : your trainer

Assistant Directors : everyone else

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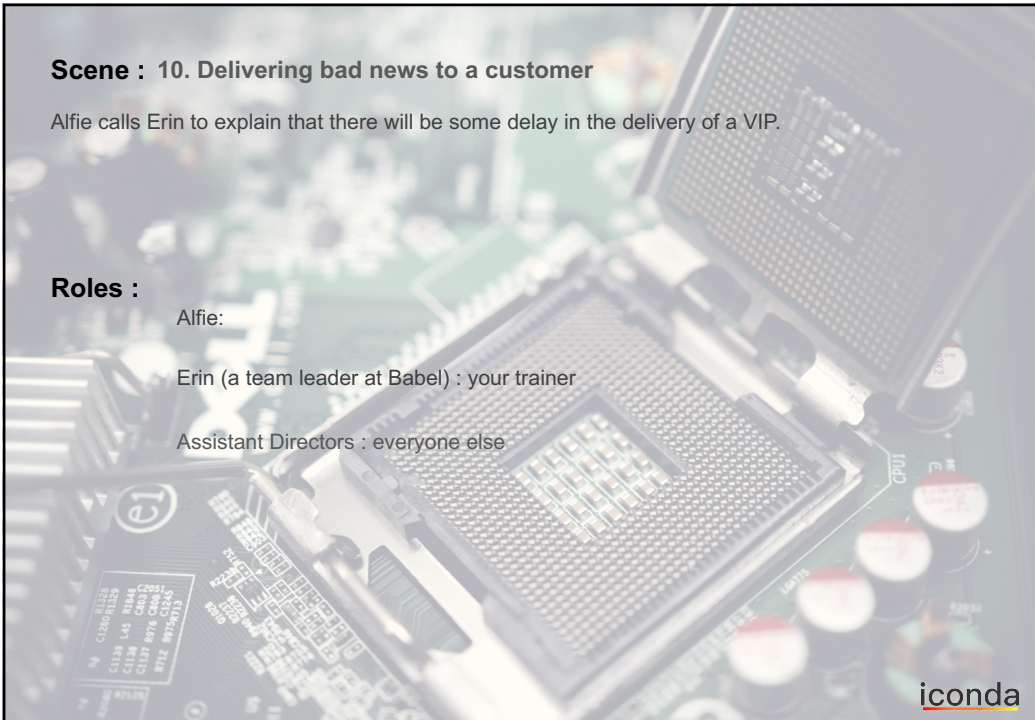
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**Scene : 10. Delivering bad news to a customer**

Alfie calls Erin to explain that there will be some delay in the delivery of a VIP.

**Roles :**

- Alfie:
- Erin (a team leader at Babel) : your trainer
- Assistant Directors : everyone else

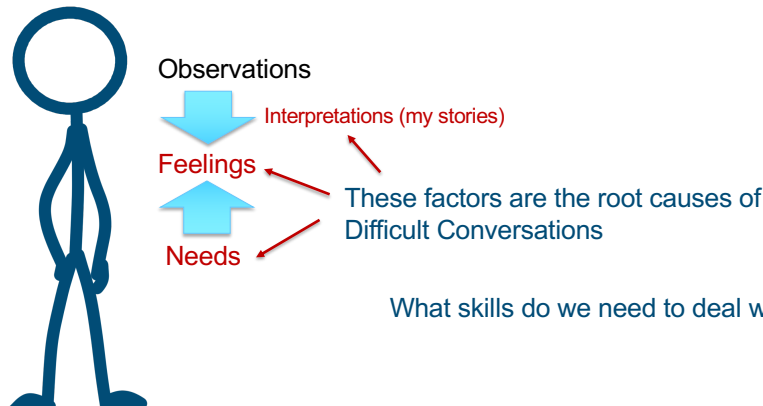


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## Aspects #2 and #3

440



Observations

Interpretations (my stories)

Feelings

Needs

These factors are the root causes of Difficult Conversations

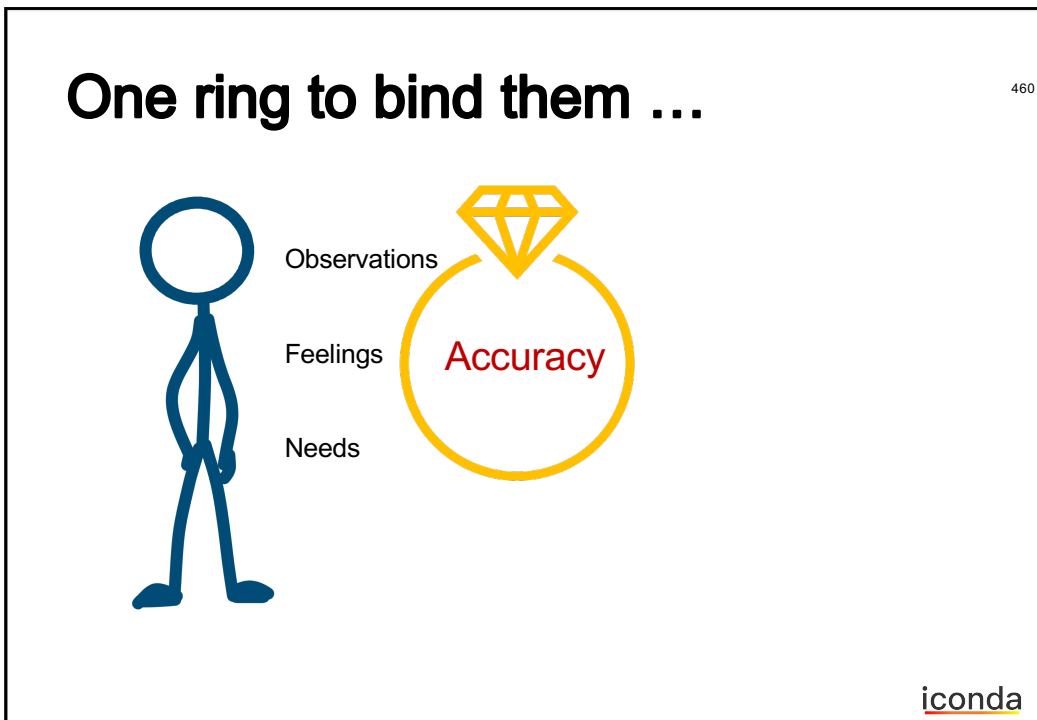
What skills do we need to deal with them?

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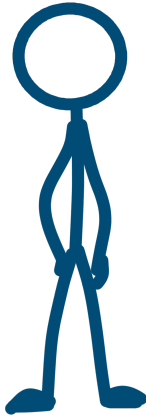
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## Aspects #1, #2 and #3

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The objective situation

*"it is ..., there are ..., on <date> ..., the email stated ..."*

What I am really feeling

*"I am annoyed, embarrassed, confused, worried ..."*

What I truly need

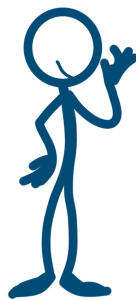
*"I want, prefer, like, need, ..."*

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## /!\ Warning !

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me



them

- Well-intentioned words can detonate unseen issues !
- It must be clear that I am explaining, not accusing
- If necessary, say this explicitly

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### Scene : 11. A difficult call with a customer


Following the call with Erin in the previous scene, Alfie calls Drew. They are extremely unhappy to have learnt from Erin that Drew blamed them for the delays to the VIP release. They thought that they had an open and trusting relationship with Drew, and now they feel betrayed.

#### Roles :

Alfie:

Drew (a Babel engineer): your trainer

Assistant Directors : everyone else



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### Scene : 12. A difficult encounter with the Sales & Support Manager

This is an internal call between Alfie and Brennan (the Sales and Support manager that Alfie reports to). Alfie has decided to confront Brennan about an issue that they've been concerned about for some time: lack of guidance and feedback.

#### Roles :

Alfie:

Brennan (MyTech's Sales & Support Manager): your trainer

Assistant Directors : everyone else



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## Key Points

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- The SUBROUTINE: a general purpose communication tool with 3 modes
  - Discovery (for obtaining Input)
  - Expressing/asserting myself (for producing Output)
  - For running a Self-Check: personal reflection (not covered here)
- The same principles apply in all 3 modes:
  - Avoid judgements, rules and suppositions
  - Situations are *objective*, Problems & Needs *subjective*
  - The key is **accurate** expression of **facts** and **feelings**

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## Homework

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- Review your notes, the book, etc.
- Find one learning point that you can relate to an experience
- Please come to the next session prepared to explain this

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