Process Guidelines

Transition Meeting and Expectations Session

Reliant - December 2018

Preface

This general guide was developed to enable account managers to conduct Transition Meetings and Expectations Sessions in their business. It provides a step by step approach on how to conduct these meetings and sessions. Facilitation tips and comments are also included, to aid in the process. We do realize that elements of this guide may need to be modified by countries or entities based on their cultural differences and special circumstances.

As the Transition Meeting and Expectations Session are very similar, but do have some differences, both processes are separated in this manual. In the first part the Transition Meeting is described in full detail. In the second part the differences with the Expectations Sessions are explained.

CONTENT

Introduction

What is a Transition Meeting^{sm}?

The Transition Meeting is a facilitated strategic meeting between Reliant and the key stakeholders within the client's team. The purpose is to have the client express what they expect the Reliant team to achieve over the coming 30 days, 90 days and first year of operation and to prioritize those expectations. Reliant can then align and prioritize resources accordingly.

This formal meeting improves the ability to work as a genuine business partner, to create relevant value to the client and increase our competitive advantage. It is the day when the sales team of Reliant officially passes the baton over to Reliant Delivery with the client present. Hence the name Transition Meeting.

The objective of the Transition Meeting is to capture a clear set of agreed upon, prioritized expectations and timescales for achievement *prior to the start of the contract* and also to share our expectations of our client. Clients always have expectations about the (start of the) cooperation that have not been included in the commercial proposal or have not been made explicit.

After the Transition Meeting, expectations have been aligned between all groups: Reliant (Sales and Delivery) and the client (buyers and users).

Note: The Transition Meeting is not part of the sales process. This meeting is solely for the purpose of understanding our client's expectations in detail. Also, operational and implementation plans should be discussed separately, unless these details surface in the client's or Reliant's expectations.

Why do we need a Transition Meeting?

Effective account management relies on three key elements:

- Managing expectations: providing the technical expertise in the service areas we were hired to manage,
- Nurturing professional relationships,
- Providing relevant value to the client when compared to self-operation or the competitors.

We know from experience different people will have different expectations of what we will achieve. During the Transition Meeting, each stakeholder is provided an opportunity to share their expectations of Reliant and discuss priorities as a group. For Reliant, it is an opportunity to understand the importance of each expectation to the client organization and to adapt our services so as to bring our clients relevant value.

This meeting will help us understand what the client expects of us and how we will jointly measure progress and success. By prioritizing the client's expectations, the Reliant team will manage the services more effectively by focusing on what is most relevant to the client today.

Clients are judging our performance based on *their expectations* of our performance.

Expectations hold everything a client sees as desirable and feasible. In real life, expectations are usually communicated as non-specific and non-measurable.

What are the benefits to the client?

Prior to the Transitions Meeting, the client representatives may have never shared their expectations of Reliant in detail. This meeting provides an opportunity for sharing expectations and for us to create a roadmap with short-term and long-term goals.

It is also a powerful tool that makes the client see us differently. It gets the Reliant team as well as the client team more involved in creating value in the cooperation, beyond the contracted value.

The flow of the meeting might seem quite simple. However, the success depends on following a step by step approach as described in this guide and on following up on the commitments that are made.

When is the meeting held?

A Transition Meeting is conducted **after** we have been awarded the contract (or a letter of intent in some cases) but **before** we sign the contract. It is also held for a new service to an existing client to clarify short and long-term expectations. We recommend communicating during the proposal phase that a Transition Meeting will be planned.

Who attends?

The client organization must be represented by all decision makers and influencers from both “buyer” and “user” groups, i.e. key personnel affected by Reliant’s service delivery. Typically, this meeting may be attended by anyone on the client’s side who is involved with the management of the contract and has been part of the sales process, including their senior executives.

Who conducts the Meeting?

The most senior executive present opens the meeting and then turns the facilitation over to the session leader. It is important that the meeting is facilitated by an individual who is competent in meeting facilitation. Preferably by the account manager.

How long does the meeting take?

The length of a Transitions Meeting is determined by the number of clients in attendance. Based on experience, you should allow 30 to 45 minutes of meeting time for every client attending the meeting, with a minimum of 2,5 hours.

What does the timeframe look like?

Timetable for session leaders:

In case of four people from the client's organization are attending:
Total time: 2 – 3 hours

Introduction:	5% of total time:	5 - 10 minutes
Client expectations gathering:	55% of total time:	40 - 65 minutes
• 30 days expectations		20 - 25 minutes
• 90 days expectations		10 - 20 minutes
• 1 year		10 - 20 minutes
Client consensus on priorities:	10% of total time:	10 - 20 minutes
Break:		15 minutes
Reliant's review and commitment:	15% of total time:	15 - 25 minutes
Reliant's Expectations of client:	10% of total time:	10 - 20 minutes
Closing:	5% of total time:	5-10 minutes

Steps in the process

- First communication about upcoming Transition Meeting during proposal phase. It is the responsibility of the sales person that a successful Transition Meeting will be held prior to signing the contract.
- Determining who should attend from Reliant
- Determining who should attend from client side
- Sales or Account manager reaches out to main contact person in clients organisation and clarifies Transition Meeting
- Inviting (preferably face-to-face) by account manager or Reliant senior management (not by client)
- Planning a date and place
- Sending confirmation
- Preparation meeting with the Reliant team
- Conducting the Transition Meeting
- Drawing up report
- Follow up and reporting on progress.

Organizing and preparing

Selecting attendees

The success of the meeting strongly depends on having the right people attending. Whether the right people will attend depends on our persuasive communication (see page 10). Busy people will accept the invitations to attend only when they think it is time well spend.

Three sorts of people should be invited. People that can hire us, fire us or influence that decision.

Don’t forget the meeting takes place on our initiative. Do not let the client decide who will attend. Use your manager’s influence if needed.

Typically, this meeting may be attended by anyone on the client’s side who is involved with the management of the contract and has been part of the sales process, including their senior executives.

The number of participants should match: it is best to avoid having more Reliant people present than client representation, as this can seem overwhelming or intimidating.

The optimum number of people form the client-side attending is 4-5, and the recommended maximum is 8. If there are too many, it becomes too time consuming and difficult to maintain attention.

On the Reliant side, the attendees are:

- The sales person / account manager
- The responsible executive
- Delivery manager
- Country manager
- If applicable, other important contacts or specialists may be invited

On the client’s side:

- The people responsible for the outcome of the cooperation from finance, clinical, operations and purchasing
- The person making the final decisions
- All important influencers of the decision makers

Informing your prime contact.

In order not to bypass the prime contact, you should inform him or her in advance. Do this personally and explain what a Transition Meeting is and why it is necessary. Discuss whom you would want to attend and ask for their confirmation. Your contact may suggest other people to attend.

Be clear about the time needed for the meeting.

¤ **Note:** Do not let your contact invite the other people to the meeting, unless there is absolutely no other way. You are better prepared to communicate with persuasion and answer questions than your contact is.

Set the meeting date.

Discusses the Transition Meeting and set the meeting date with the client. The meeting should be scheduled at least 4-6 weeks prior to execution.

¤ **Tip:** Begin by identifying two or three dates, which will work for all the Reliant attendees. Then present the client with one or two choices. One person in the client group may be able to identify open dates for all the client representatives.

Reserve the Transition Meeting Room

The room for the Transition Meeting is reserved prior to the pre-planning meeting and should be visited before the meeting takes place if the room is unknown.

- The room should be available at least one hour prior to the scheduled meeting time.
- The room should be large enough to comfortably seat all attendees and allow them to face the flip chart used by the session facilitator.
- Sufficient wall space is required to post charted expectations, in such a way that notes can be added to the wall chart paper later in the process.
- Make sure there are enough wall chart easels and wall chart paper.
- Anticipate reservation of equipment (LCD, etc.) if appropriate.
- There should be a reserved area nearby (not in the same room) for the clients' break.
- Plan to offer beverages (water, coffee, etc.) during the meeting.

Invite the participants

Invite all other participants by phone or face-to-face. That will give them the opportunity to ask questions.

Then send a formal and individual invitation e-mail (See the template for an example).

¤ **Tip:** It may help to include a formal agenda for the meeting. (See the template for an example).

Persuasive communication

Get the client's buy-in for the process

When Sales speaks to clients about scheduling a Transition Meeting, his/her goal is to get the clients' support for organizing the meeting.

He/She should explain that:

- It is part of Reliant' way of working to hold this type of meeting. We will not start a contract or a new service without a Transitions Meeting,
- Reliant has learned from experience it is essential that we have a clear understanding of what is expected of us, so that we can align our resources to the client's expectations (all stakeholders).
- To begin with the end in mind is to create a road map for Reliant so that we operate against one clear, agreed-to set of expectations,
- Their participation in this will ensure that Reliant has a clear direction for the next year,
- This meeting will create a stronger and more effective partnership and by having this meeting, we can reduce the amount of time spent handling issues,
- Every stake holder has different objectives and goals; this meeting also provides a forum to hear expectations that others, within the same organization, have of Reliant.

Do's:

- Underline it is essential to you to have this meeting
- Convey the benefits to them
- Be prepared to overcome objections
- Be prepared to suggest attendees and dates
- Ask for their support to endorse the meeting and its importance
- Demonstrate a quiet pride and determination that demonstrates your confidence in the value of the Transition Meeting.

Don'ts:

- Say it is mandatory
- Ask that they do this as a favour to you
- Ask for their permission
- Try to sell it as an 'extra'

Sample Script for building a persuasive communication during the sales process:

"I would like to plan a Transition Meeting together. This is a strategic planning session where we discuss our mutual expectations on achievements for the coming year.

As a partner we need a clear understanding of all expectations from the various stakeholders and how you prioritize these as an organization.

A Transition Meeting is a formal meeting. It will lead us to convey expectations to short- and long-term goals in a structured way. The meeting will result in a year plan to deliver relevant value to all parts of your organization that expects to benefit from our cooperation.

From our management @@ and && will attend the meeting. I would like to invite @@ and && from <client's company> personally, so I can answer all questions they may have about this meeting. Should we invite other people to this meeting?

I would very much appreciate your support in scheduling a Transition Meeting at <client's company> and in making sure that key personnel affected by our service delivery (buyers and users) are present at that meeting.

I have the agenda for the meeting. We can distribute it in advance of the meeting if you like (See the template for an example).

Overcoming difficult questions from clients

Clients who are not familiar with a Transition Meeting may think that it is not necessary to hold that meeting.

> ***"We don't need this. Everything we expect is in the contract or service level agreement."***
> *From experience we know that expectations tend to stay implicit and many expectations have not been captured in our agreement. Usually, different stakeholders have different expectations. We need this meeting to understand the expectations of the stakeholders, how they are prioritized and how progress will be measured. Although this request is new, it is part of our desire to clearly understand the needs of your organization. Senior management involvement is critical for our mutual success.*

If the client remains sceptical you should ask: *"Would you help me understand why you do not want to participate?"*

Clients ask questions to learn about the potential value this meeting could have for them. However, it is important to stipulate this meeting is something we need to be able to meet their expectations.

¤ **Tip:** It has proved to be effective to have senior management to invite higher management in your client's organization.

The following questions may be raised regarding the Transition Meeting process. Along are potential responses to help you overcome them.

> ***"What goes on at this meeting? Do you have an agenda?"***
> *Yes, I have the agenda right here. It is an interactive meeting and I can promise that you and your team will find the outcome to be very positive. Our clients tell us they appreciate the structured approach and find the agenda and method we use to be*

very productive.
Unless we understand and agree to the clients' collective and agreed upon expectations, neither of us have much chance for success. Everyone is essential to the success of the meeting. We need input from a strategic level from you as our client.

"I'm very busy and I don't have time for a three-hour meeting"
The output from this meeting guides our service plan for the next year. It is critical that we understand your individual and collective expectations through the process of gathering the input from you and your colleagues. It is equally important that we have the opportunity to discuss your priorities in order for us to understand that things that are most important to you and your organization. We need this meeting to be able to meet your expectations. The time invested now will save us a lot more time in the future.

"You're the experts in this business. Why don't you tell us what we should be expecting?"
We would love to be in that situation where you give us a clean slate to define the performance goals and the way you will measure our success. And we will certainly bring our ideas forward. But we know from experience that the most effective and collaborative relationship is one where we jointly are involved in defining value. We do not want to guess, or to do that in a vacuum. It is not fair to either of our organizations.

"Will this make us better partners?"
Absolutely. We know we can operate exactly the same way – same program, same support, same results – and have one client thrilled with us and the next deeply disappointed with us. At the end of the day, it is not just about our performance – it is totally about our performance relative to your specific expectations. This level of communication and mutual commitment is the very essence of the partnership we are seeking to foster with you.

"Do you do this with all of your clients?"
Yes, we believe the process is so powerful and important to you and us that we will not accept or enter into partnership with any client unless they agree to participate in the Transition Meeting. It is a part of the way we do business. This meeting is critical to our success and succeeding with every client defines the reputation for the leadership we intend to maintain and build.

"I don't want to do this. My staff will handle this. I do not want to take their responsibility away. Why can't you just go talk with them?"
We know that meeting your personal expectations will define the value you will perceive from our cooperation. It is crucial for us to understand what your personal expectations are and how they differ from other people in your organization. From experience we know only a Transition Meeting will provide us with enough detail on the expectations Reliant will have to meet in the coming year. It is equally important for us to understand how they are prioritized.

Overcoming internal inertia

Sometimes it is harder to get the right people from our organization in one room, than it is to get the client to cooperate.

Remember: Only if we know the specific expectations and priorities of our client, we are able to be of relevant value. And we are allocating our resources more effectively and efficiently.

Here are some of the common remarks and possible answers.

"It takes too much time to organize these meetings."
Convince your delivery team that performing well on the contract will be a lot easier after this meeting. Clients will always have expectations they didn't know they had or that we didn't know they had. They will judge us by those expectations, whether we like it or not. These are often expectations about how we do things. We need to understand how they will measure our performance.

"Why do we need a Transition Meeting? I meet with my client every month."
There are many people influencing the contract. It is important that we hear what expectations every individual has of us and how they prioritise these expectations as a group. The formalized structure of a Transition Meeting will help to identify expectations. These will be discussed by the client and prioritized. Then we know what to achieve and what to achieve first. In this meeting we will also learn about possible expectations that are beyond the contract or our possibilities. That will help us manage expectations.

"We already know our client's expectations."
This is not about what you think your client expects. This meeting is to help the client to be as detailed and specific as possible. We need them to have a conversation about expectations and get aligned. This will help us, and them to get the most out of our cooperation.

"The client has expectations we cannot meet."
That is possible. It is better to know these expectations and let the client prioritise them for us. If these expectations are beyond the contract, this is the right moment to manage them. Not meeting expectations will jeopardize the contract.

In the Transition Meeting we also speak about the conditions under which we can commit ourselves to the client's expectations.

"Does the Transition Meeting result in extra activities?"
No, it will not. By understanding client's expectations in detail, we will be able to save time and energy. Reliant will provide what the clients expects and not what we think the client expects. It will prevent us from wasting time and energy on things that have no, or little relevant value for the client.

"Will we provide solutions and make suggestions to the client during the transition meeting?"
No, de Transition Meeting is not the right moment to rewrite the contract or make suggestions on how to achieve expectations. The Transition Meeting is all about understanding the client's expectations in detail. Complex matters will be discussed internally, so we have time to think about ways to meet expectations and under which terms and conditions.

"Will we conduct Transition Meetings with all our key-clients?"
Yes, we will conduct Transition Meetings as described in this guideline. These meetings are crucial for our future successes.

You can suggest the following to help colleagues understand the value of the Transition Meeting:

- Attend a *Clients for Life Overview* training session or the online training program on Clients for Life®.
- Have an experienced session leader explain what a Transition Meeting is and how it is executed.
- Ask colleagues about their experience with earlier Transition Meetings and the results.
- Share reports of earlier meetings and show results.

Internal preparation

Prepare the Reliant Team

There is much at stake in this meeting. An internal preparatory session with the account team is **essential**. Lack of preparation prior to the Transition Meeting will lead to having a less effective meeting and lesser results.

Objective: Meet with Reliant' members of the web of influence to discuss the details of the Transition Meeting, anticipated client expectations and Reliant's expectations. The Reliant team meeting should be conducted in person -or via conference call- at least one week prior to the actual Transition Meeting. The meeting duration is approximately one hour, but may take two hours or more, depending on the complexity of the contract and the number of planned participants.

¤ **Tip:** While anticipating the client expectations and preparing the Reliant expectations ahead of time, the Reliant participants should ask clarifying questions to each other to ensure expectations are Specific and Measurable (SaM).

The planning meeting agenda should be sent to the Reliant participants in advance of the in-person meeting or conference call.

Agenda:

- Meeting location
- Logistics including room set up, materials, break and timing
- Review of Transition Meeting agenda, process, flow, norms and roles
- Pertinent information regarding contract terms, communication documents, proposal presentation slide shows, etc. (for reference)
- Previous expressed expectations and their priorities.
- Anticipated client expectations and Reliant's response to those expectations (see below)
- Discuss and prepare Reliant's expectations of the client
- List client participants (anticipated)

¤ **Tip:** Often, at the preparation meeting, you may not have the client attendees for the Transition Meeting confirmed. You will use the preparation meeting to determine your strategy as to whom from Reliant's organization will attend. This is based upon your best guess as to which of your clients will attend the meeting. You will not 'overpower' your clients by bringing more senior people to the meeting.

1. Brainstorm anticipated expectations of client attendees and discuss Reliant's response to each expectation. Our options are:

a. We can fulfill the expectation as expressed
b. We can fulfill the expectation with some modification:
    I. Doable at a later time

II. Doable with additional resources
c. We need to do some research and will respond to you by X days
d. We are not able to fulfill the expectation because of X, Y, Z.

¤ **Tip**: Reliant's managers should be comfortable with saying "no" in some instances. This can open the discussion to present Reliant's expectations to the Client organization. Never leave the room letting your client believe that you can do something when you can't! Transparency is very important.

2. Determine Reliant's expectations. Discuss your reaction if the client is not willing to meet your expectations.

Examples of Reliant expectations: be paid on time, complete annual survey, commit to attend the Annual Expectations Session, provide certain information, etcetera.

Why is it important for Reliant to have expectations of the client?

- *If we are to manage their expectations, there are certain resources we may need from them,*
- *We may need access to particular senior management to comply with their expectations,*
- *It demonstrates their commitment to our mutual success.*

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3. Define roles and responsibilities

Roles and responsibilities among the Reliant team can also be "pre-defined" as follows:

- Facilitator – In majority of cases, the sales person or account manager will assume this role.
- Note taker – This person will take notes on important things that are said and happen that are not captured on the wall charts. Notes down the color marker used by each client
- Timekeeper/Recorder – Keeps the meeting on schedule and ensures sufficient time is spent on establishing the clients' priorities.
- "Clarifiers" – All Reliant attendees. Every attendee of Reliant is invited to participate in asking clarifying questions. The aim is to help the clients come to a Specific and Measurable definition of their expectations. It is helpful to model clarifying questions during the pre-meeting.

Preparation Meeting Recap

After the meeting, the session leader recaps the meeting.
The sales person should confirm attendance with all clients at least one week prior to the meeting.

Prepare meeting materials

Materials include; wall chart, different colored makers, tape, index cards and pens (and name-cards if used). Plan to offer beverages (water, coffee, etc.) during the meeting.

Know the process (review and rehearse)

Review this manual and re-familiarize yourself with its content.

It is critical to the success of this session, that:

1. You know who's who, and know how well they work together.
2. You do not try to conduct other business with the Transition Meeting. The only purpose of the meeting is to gather clients' expectations for the first 30 days, 90 days and year of operation.
3. Delivery plans and implementation plans should be discussed separately meeting. If clients bring these things up, try to 'lay these aside' for another meeting if possible.
4. Your client liaison is involved and supportive.
5. DO NOT educate your client or solve problems. Simply ask questions to clarify expectations and write them down.

Conducting the meeting

Make sure you arrive at least one hour prior to the start of the meeting to set up the room. Know where toilets are and where your client will be during their break.

Room configuration and seating order:

- Decide the table seating (who sits next to who) and alternate clients with Reliant attendees around table (when people walk into the room, they are most likely, if left to them, to sit next to someone they know).
- Review position, title of all attendees (Reliant and client organization): what we want to do is to sit the client's representatives besides or across to the person who is going to be their key contact in our Web of Influence. The use of name plates is most effective:
  - As it is the first-ever meeting, it sends the message that this is a different type of meeting,
  - It lets the participants know that this is Reliant's meeting and that we are prepared and professional,
  - It is very helpful when we bring together members of the client organization that may not know one another.
- Handwrite the clients' names on cards as well as the job title and company name. (handwrite because someone you did not expect might show up for that meeting).
- Discuss the need for special seating arrangements i.e. position /peers/ political.
- Make sure there are enough wall chart easels, wall chart paper, and tape.
- Make sure there is enough water, cups etc.
- Make sure you have a break-out room available.
- Make sure you have enough markers of different colors.

Prepare the charts:

- Write the Reliant expectations at the back of the wall chart (prior to start of meeting). Make them visible at the appropriate time.
- Prepare a wall chart that explains the SaM acronym (Specific and Measurable).

Start the meeting on time.

Introduce all Reliant and Client attendees as participants arrive. Ensure all parties know each other.

Even if an agenda has already been sent, provide the clients with an overview of the meeting on paper (see the agenda template for a suggested agenda).

Explain the Process to the Clients

Review the meeting agenda, introduce the SaM method and distribute index cards.

Example opening comments at a Transition Meeting:

"Good morning, welcome and thank you for meeting with us. We appreciate the confidence you have shown in Reliant by partnering with our firm to manage……………. (Services) at ………… (Account name).

We realize that some of you are meeting for the first time today and so I would like to introduce the members of my team and would ask you to introduce the members of your team.

(…)

Thank you. I'd like to briefly explain the purpose of our session today. Whilst we have a contract that details the specification requirements of our service, we need to ensure that the way in which we provide it supports and reinforces the goals and objectives of your company. So firstly, we will ask you to identify your expectations and then we'll ask you to reach a consensus on your priorities. We'll then break for coffee and at this stage in the meeting we would ask you to allow us, the Reliant team, to have 15-20 minutes to review your expectations. And then finally we will share our expectations of you as our clients. I'd like now to handover to …# (facilitator).

Example of Facilitator's comments:

This meeting is an important step in ensuring our relationship progresses in a way that creates value for both of us. All of us at Reliant have every intention of meeting the expectations you have of us. In order for us to do that, we need to know precisely what your expectations are and how you, as the management of the organization, prioritize them.

The more able we are to clearly understand what it is you expect of us, the more likely we are to deliver the service to the standard you require.

To understand, we first need to listen, so my job today is to capture your expectations and to allow my colleagues to listen and concentrate on ensuring they fully understand what you expect them to achieve. So, don't be surprised by the fact that during this stage of our session my colleagues will essentially be sitting quietly.

However, if they need further clarification, they will support the process by asking clarifying questions. They won't be interjecting and positioning solutions at this stage of the session, they will simply be listening to your expectations. The time for them to respond to you will be later in the session. Before we depart today, they will confirm how and when they will respond with their action plan explaining how they would propose to meet your expectations.

We really appreciate the time you have given us today, I know how precious time is, *so if you will allow me, part of my role today will be to keep us on track time wise, "Is that OK with you?".*

The first thing I am going to ask you to do is to describe for me what you expect Reliant to achieve, from your perspective, over the next 30 days, 90 days and 1 year.

Allow me to introduce a concept at this point called SaM. SaM is an acronym for the way we would like you to think about expectations and how you express them. "S" stands for Specific. In other words, the more tightly you can define the expectation, the easier it is for all of us to understand and manage it.
"M" is for Measurable. The yardstick we are using to see if we have succeeded. It's important we have agreement between us on how we are measuring success and what it looks like.

Any questions before we start? OK.

Capturing expectations

Ask clients to write "30 days" on top of one index card, "90 days" on top of a second index card, and "one year" on the third. Then ask them to list on the three cards the expectations they have of Reliant for the next 30 days, 90 days and the next 12 months.

¤ **Tip:** As an alternative to the index cards, you may provide the clients with paper that is printed with the client's organization's logo and the Reliant logo. This can communicate the partnership between both organizations.

Example of Facilitator's comments:

"If you would, please take the card I am giving you and write 30 days on the top of it. Remembering the SaM principles, list the expectations you have of Metronic for the next 30 days. In other words, over the next 30 days, what specifically do you expect to see happen – what do you expect to see accomplished? By the way, we will not be collecting these cards, so penmanship does not count."

Everyone is quiet and sits still. The facilitator will observe clients and when it appears that every person has stopped writing expectations, the second card is given.

"On the second card, please write 90 days across the top. We ask you to list your specific and measurable expectations for where you would like the relationship to be in 90 days."

Again, the facilitator will observe clients and when it appears that every person has stopped writing expectations, the third card is given.

Lastly, on the third card, please write 1 year across the top and list your specific and measurable expectations for where you would like to be one year after the start date".

¤ **Tip:** The client might ask: *"Why the cards? This seems silly… why don't we just talk about these things?"*

Suggested response:
"The cards bring structure and clarity to the process. By completing the cards independently, we ensure that the expectations are shielded from peer influence. By eliciting expectations one at a time, in turn, all voices have the opportunity to be heard. We have found this to be an effective technique to build consensus".

When everyone is ready writing, it is time to gather expectations. Generally, it will take the clients less than 15 minutes to write expectations on the cards.

¤ **Note:** While the client is writing down their expectations, the Reliant team will sit quietly and will not be talking. They can write on their pads, but they are not talking either to their colleagues OR the client's team. They will not shuffle papers, work on their phone, tablet or computer or get up and walk around, leave the room or whisper to each other. Also, remember valuable information can be gained from observing the clients writing their expectations: how they interact, who defers to whom, what is the overall power and dynamics of the group. The facilitator may sit down, but only when the clients are writing their expectations.

The first person that is finished with his/her list of expectations should be recognized by the facilitator and positively reinforced for the fact that he/she is finished. Again, here we are sending a message to the rest of the participants that it is OK; in fact, it is good to be finished. In other words, this is not about dueling expectations or who has the longest list. (Brevity and conciseness are valued).

Example of Facilitator's comments:

> *"I see some of you have finished so we'll give a few more minutes to those of you still working on it – Thank you".*

Gather the expectations

Example of Facilitator's comment:

> *"Now I will go around the room and take one expectation from each of you in respect of your short-term expectations, i.e. over the next 30 days of the contract".*

It is important that you understand and adapt the procedure to the culture of the organization and the country. It may be important to begin with the most senior person first. In other cultures, a senior person would not be offended if a less senior person is asked for his/her expectation first. Beginning with a subordinate or an individual who is hesitant to speak up can be very effective. In some situations, when the boss has the opportunity to go first, the direct reports may be less inclined to express a different expectation.

The facilitator is here to facilitate the portion of the meeting where the client presents their 30-day expectations. Specifically, he/she will be responsible for:

- Eliciting 30-day expectations from each participant (1 expectation per person so as to give everyone the opportunity to express themselves and keeps everyone engaged)

- Clarifying each expectation with the help of other Reliant representatives, as well as the measurement that will be used to determine if the expectation has been met,
- Summarizing expectations on the wall chart (as a page becomes full, hang pages in order on the wall).

The facilitator should then continue that process with the 90-days and 12-months expectations, until all are captured on the wall chart: elicit the expectations sequentially, from each individual until all expectations have been provided for the specific timeframe.

In a Transition Meeting, understanding EXACTLY what the client has said is critical, as it will form the basis of how they perceive us delivering value.

Clarifying expectations

Use of open-ended questions instead of educating and/or offering your opinions.

Educating and/or offering your opinions while probing should be avoided:

- If your opinion or suggestion is in conflict with that of your client, he/she will most likely be embarrassed, annoyed or even insulted by your educating style probing technique,
- If your opinion or suggestion goes beyond your client's expectation, you have just given yourself a greater project than the one your client had in mind for you.
- Be on the look-out for 'watch words': Like, Want, and Wish. These words often precede very vague expectations that cannot be measured, and this is very often how clients describe their expectations. Keep in mind that the Transition Meeting is a meeting for gathering expectations – not a blue-sky, wish-list, brainstorming meeting. This meeting is about what they expect to see happen, not necessarily about what they might be wishing for or want to see happen.
- It is very important that the facilitator does not become involved in defending, protecting or rationalizing any of the client's expectations. Now is not the time to negotiate but it is time to ask for clarifications.
- Dealing with expectations of service outside of the contract or unrealistic expectations: This is not the time to say YES or NO. We should take the necessary time during the break to assess the situation and organize options. This is the time to make sure you fully understand the clients' expectations. That is all.
- Never interrupt or engage when clients get into their own dialogue. This dialogue within the client group is healthy in order to allow them to come to a consensus. The role of the facilitator here is to stand back and let this play itself out. Clearly, this is a point that demands agreement. If they can come to an agreement on their own, this is preferable from our point of view.

While the clients are sharing their expectations, listen attentively to the description of their expectations, takes notes on what is being said and who said what. Do NOT show reaction on your face if they come up with something off the wall or talk about whether or not you can deliver the expectations. If you must use the word 'okay' before restating or paraphrasing, MAKE SURE you follow up with "then your expectation of Reliant is…." In and of itself, 'okay' infers agreement. This is not the time to agree or to disagree with your client's expectations; it is time to simply understand them. You don't want to mislead your clients.

1. To summarize or paraphrase:

To be able to paraphrase, you need to be able to understand what the person has said and to put it in your own words. An effective way to become more comfortable with the concept of paraphrasing is to start using it on actual problems, so that you'll be more capable of using these techniques in front of your clients. Some examples include:

   a. "Let me see if I've understood you correctly… you are looking for…. Is that it?
   b. "Let me see if this captures it….so then your expectation of Reliant is…."

2. To encourage more information:

Open-ended questions will provide you with information and invite your clients to further tell you what's on their minds.

   a. Please tell me more about…. Or if you can, please be more specific about the way in which…"
   b. "Help me understand what you mean…"
   c. "Please describe for me what … means to you?"
   d. "Who would be the person responsible for….?"

3. To get more clarity/description:
   a. "What should we specifically look for in order to…?"
   b. "How would you define…? (for example: quality)"
   c. "Can you give me an example?"

4. To determine measure:
   a. "How would you know when XYZ is done/completed/started?"
   b. "How would you measure the ABC improvement/increase/decrease you just referred to?"

(It is critical that we are able to express how success will be measured. By being able to measure something, we are then able to demonstrate achievement)

Getting to the Top Priorities

At this stage, all 30-days, 90-days and 12-months expectations have been expressed and captured on the wall charts by the facilitator. Equally important is now to prioritize the importance of each client's expectations. The number of expectations to be prioritized is calculated as 25% of the longest list. For example, if the one-year list has 21 expectations on it, the magic number will be 5. In this case, we will ask the clients to select the top five expectations on each list, which they would judge to be the priorities for the institution. The minimum number of expectations for any list is three.

¤ **Tip:** As the clients' expectations are recorded for each time period, one of the Reliant team members keeps the tally of total numbers. When the time comes for the facilitator to ask the participants to rank a specific number, the team member can slip a card to the facilitator with the number to be prioritized, calculated on 25% of the longest list.

Example of Facilitator's comments:

> *"Thank you for expressing your expectations. We understand that all expectations are important to you. However, it is time to understand the order of importance of your expectations so that we have unanimity on not only what to do, but the order in which we should prioritize it. This consensus ensures that we are managing against one set of expectations that you will collectively use to judge the value we provide in the relationship and not a different set for each client involved".*

Provide each client with a different color of marker, read through the whole list of expectations ("Let's briefly review the expectations you have come up with") and for each of the timeframes, ask the clients to prioritize the number of expectations as explained above. They are asked to go to the wall chart pages affixed to the walls and vote for their priorities by writing a "5" (in this example) by the highest; consecutively through the number we have asked them to prioritize.

The Client may express concern about the prioritization process:
"All of our expectations are important, or we wouldn't be bringing them forward in this meeting. We don't want to prioritize; we want you to just do these things—that is why we hired you".

> *Of course, you're right that all the expectations are important. We recognize that and will document all of them in the output. We know however that, as author Steven Covey says, we should put "first things first". All of us prioritize our daily and weekly tasks. We want to do the same; only with input from you collectively as to what is most important and will have the most impact.You may not fire us if we don't do the bottom two things, but you could if we don't do the top two. So, can you help us understand what those are? We have learned over the years that in order to truly succeed in delivering the value you expect we need one set of corporate expectations against which you will judge our performance. Otherwise, we cannot be successful when trying to manage against disparate sets of expectations and priorities.*

Break to Review Expectations and Prepare Responses

Thank the clients and explain you need a 15-minute break to review, discuss their top expectations.

The clients leave on a break and the Reliant team stays behind to continue the work.

What if the client does not want to leave for a break and argues that they have been here quite a while and just want to get finished? The Reliant team should try one more time to convince the client by explaining that you need a little bit of privacy to tackle openly the priorities.

Example:

> *"The truth is we need you to leave; the break is for us more than for you. It is not that we mean to be mysterious; we just need the time to develop our responses, commitments and resource plans to exceed your expectations. These internal conversations are most productive in private. It won't take long. You can understand*

that?"

During the break

First, rank all expectations based on the totals of participants, circle the top 25 percent. These are the priorities. If there are more than 25 percent with the same rankings, also include those expectations.

Second, we have to decide for ourselves whether we can meet each individual expectation as it is provided to us. There are 4 fundamental options:

1. We can fulfill the expectation as expressed
2. We can fulfill the expectation with some modification:
    a. Doable at a later time
    b. Doable with additional resources
3. We need to do some research and will respond to you by X days
4. We are not able to fulfil the expectation because of X, Y, Z.

For those expectations which did not make the priority list, we must be aware which clients may have offered it/or voted for it (Hence the importance of identifying who is using which colour marker). Although we won't deal with them in this meeting (it would simply take too long) we may need to take them off-line with the client involved, particularly if they are high ranking or especially adamant. Also, any non-priority expectations that are not doable, we should consider off-line.

Finally – During the break, (and if it has not been done before the meeting started) have a team member transfer our expectations of the client to a wall chart on a page underneath so that the client does not see them as they reenter the room. (For example: payments to contract term, answer client satisfaction survey, commit to attend Annual Expectations Sessions etc.).

Add any others, which may be necessary, based on the conduct of the meeting so far. Additionally, we may have heard things during the course of the meeting so far that would lead us to add to or modify the expectations that we have. This would be the time to add those to our list of expectations. Once that is complete, we're ready for the Client(s) to return.

¤ **Note:** In the same fashion as the clients' expectations, make sure the Reliant expectations are clearly written and meet the SaM principles. While preparing the Reliant expectations ahead of time, the Reliant participants should ask clarifying questions to each other to ensure expectations are specific and measurable.

Respond to Expectations

When the clients return from the break, discuss each prioritized expectation and our ability to meet or not meet the expectation within a mutually agreed upon time frame.

Example of Session Leader's comments

"Welcome back. During your break, we reviewed your ranking of the expectations for the time frames. We would like to get your agreement that these are the top

prioritized expectations in each of the categories.

We would like to review each one to ensure we have clarity on our ability to fulfill this expectation and that the measurement system is viable".

1. Review the priorities first and explain our commitment/position candidly in regard to each expectation.
2. Gain client consensus on action needed to ensure all clients are on board. Agreement must be secured on each expectation.
3. For each priority ranked expectations, determine which of the four options apply:
    a. We can fulfill the expectation as expressed ("We are pleased to say that we can meet these expectations as you have expressed them and within the timeframe you have stated")
    b. We can fulfill the expectation with some modification:
        i. Doable at a later time: ("*With this particular expectation, we can meet your expectation although we anticipate having difficulty achieving it within the timeframe you have expressed. We can certainly do it if you were willing to extend the timeframe to … #, how would you feel about that?*")
        ii. Doable with additional resources
    c. We need to do some research and will respond to you by X days
    d. We are not able to fulfill the expectation because of X, Y, Z ("We are unable to meet this particular expectation, currently it falls outside the contract specification that we have agreed together. However, if you would be willing to do …#, then we could incorporate it into our agreement and meet your expectation accordingly. How would you like to progress this?")

Remember: **DO NOT** commit to expectations you are unsure you can complete.

The client may express concern about Reliant' request for a delayed response.

"This expectation is important; I'm interested to hear your response!"

This expectation is one that we are not prepared to address right now. It seems to be somewhat outside our current scope of work and may unreasonably stretch the resources available to us right now. I suggest you let us separately develop a specific action plan and the associated resources to come back to you to see how we can best work together to get this done in the way you expect. Will two weeks from today be soon enough to deliver the plans?

¤ **Note:** Prioritized Expectations vs. non-prioritized expectations.
The purpose of the Transition Meeting is to elicit clients' expectations of Reliant. Prioritization is a means to identify the most important things to accomplish first, and it does not preclude us from delivering the other expectations. All expectations are important and even though the prioritized ones are really going to be our priorities and the ones to be managed first, the other expectations should not be ignored (even though there would be no commitment of completion or timeframe made during the meeting).

Review Reliant's Expectations

In a Transition Meeting, Reliant also expresses their expectations. When is the best time to ask for something? When you have given something!

Remember that this meeting is a two-way street – it's about ensuring the client is committed to doing what they need to do to meet our expectations too! This part of the meeting also provides the Reliant team an opportunity to gain credibility and respect from the client.

Explain Reliant also has expectations, which will allow us to succeed for them and advance to the next level consistent with our objectives for the account. Reveal expectations on wall chart and share each expectation in detail. Gain the clients' commitment to meet our expectations and secure their agreement/consensus after each point and timeframe.

Example of Session Leaders' comments:

> *"Now that we have agreed to your prioritized expectations, we would like to present our expectations of you and gain your agreement. As we are partners in this effort, it is important that you understand we have expectations for which we seek your agreement".*

Review each of the Reliant expectations and watch for the clients to acknowledge and agree to each. Be prepared to respond to any questions raised by participants.

Close the Meeting and explain what happens next

- Thank the clients for their time and participation.
- Give assurance of our commitment to meeting their expectations of us.
- Initially we will confirm in writing their expectations and their priorities within 7 working days in order to be sure we have understood and captured them correctly.
- Then, # (insert name) will follow-up and confirm our action plan.
- Explain we will report on progress quarterly and ask who should receive the reports and when they will be discussed.
- Thank and close.

Example of closing comments

> *"Thank you very much for a most productive session and for giving so much of your time. I sincerely hope that you found this meeting as beneficial as we did. Please be assured that we are completely committed to meeting your expectations of us.*
>
> *Within the next 7 days, we will document the commitments we have made here today to confirm your expectations and your priorities, in order to be absolutely sure, we have understood and captured them correctly.*
>
> *Within the next 14 days, we will follow-up and confirm our action plans to meet your expectations and this will form the basis of our reviews going forward.*
>
> *We will report back to you quarterly on our progress. A year from now, we will use the one-year list as a prelude to setting expectations for the following year. We believe that this is the most important thing we can do in being good stewards of the*

responsibilities you have entrusted to us—that is planning to deliver value relevant to your prioritized expectations.

Thank you again for investing your time with us today, we look forward to working with you".

Shake hands and allow the clients to leave the room.

Immediately following the meeting, the Reliant team should debrief.

Debrief: Discuss what went well and what we should have done differently:

- Overall impressions?
- What could have been done better?
- What went well?
- How good was the interaction during the meeting?
- How accurately did we anticipate the clients' expectations?

Confirm responsibilities for distributing the meeting recap. Confirm what needs to be done to create an Action Plan.

Within one week of the meeting, recap the meeting in writing and send the recap to everyone who participated in the meeting.

Follow-Up

It is important to realize that by having this meeting, we have literally established an expectation in the mind of our client that we will not only perform but also, we will follow-up. Relentless follow-up (and documentation of our successes) is the foundation of delivering value from the client's point of view. By doing so, we demonstrate that "We are the company that asks, collaborates and delivers". It is important to communicate our progress throughout the year on a quarterly basis to all present during the Transition Meeting.

Follow-up with the client

Within one week after the meeting is complete, document expectations by priority and provide to everyone who participated in the meeting. Within 2 weeks, follow-up and confirm action plan to meet expectations.

¤ **Tip:** See the template for a sample of the Thank You letter and Transition Meeting summary.

A formalized action plan may not be sent to the client, but the Account Manager should find a relevant business reason to meet with the client on a regular basis to follow-up on the expectations and to reconfirm Reliant's commitments to those expectations.

Communication and follow-up with clients on progress of action plan should take place at least once per quarter.

Follow-up among the Reliant team:

In addition to the team capturing and communicating expressed expectations to the client, there needs to be a formalized action plan in which the Reliant team assumes individual responsibility of completing the client's expectations within a defined timeframe (see the template for an example Action Plan).

Prepare meeting summary, action plan and commitment in detail on both sides. Distribute a copy to all meeting participants and any client(s) who were unable to attend the session. For the expectations that were not prioritized, make no commitment. However, those expectations you can complete will be added to your Action Plan.

The Annual Expectations Session

What is an Annual Expectations Session?

An annual Expectations Session is basically the same as a Transition Meeting. It is conducted annually, based on the fact that client's expectations will always change over time. The Expectation Session is held between Reliant and the key stakeholders within the client's team (Web of Influence®). The meeting is an opportunity for the clients to express what they expect the Reliant team to achieve within the next **90 days** and **1-year** timeframes, not a 30-day timeframe. It is also an opportunity for structured engagement with the client Web of Influence®.

The Expectations Session will start with a brief overview of last year's accomplishments.

It may happen that clients look back on past performance and talk about things that were not successful. The facilitator must try and 'bend' these remarks to an expectation for the future or lay them aside for the duration of the meeting.

Difference between a Transition Meeting and an Expectations Session

TRANSITION MEETING	EXPECTATIONS SESSION
Expectations will be asked in 3 timeframes: 30-days, 90 days and 1 year	Expectations will be asked in 2 timeframes: 90-days and 1 year
"Sellers" must be present	"Sellers" are not required
Not difficult to get people to attend the meeting as the relationship is new. We should not start a contract without a Transition Meeting. Therefore, introduction of the Transition Meeting should be part of the sales process.	At times, may be more difficult to get senior managers to attend. Especially when it is the first time an Expectations Session is held.
No review of what happened before, nor of what happened in the sales process. Clients may have expectations that were not included in the proposal. These need to be clarified and discussed.	Session will start with a <u>short</u> overview of accomplishments against agreed upon expectations. Expectations presented by the client may be new or restatement of previous expectations for the following year.

Additional facilitation guidelines

Foreword: This document on Facilitation Guidelines is **not intended to be a training reference** but should provide you with useful information for facilitating client or Reliant meetings referenced in the Clients for Life® process.

If you feel you need a specific training on facilitation skills, please liaise with your HR/Training department.

Tips and techniques to be an effective session leader

Here are a few questions to help you answer if you could be an effective session leader. Only *you* can answer these questions and there's no right or wrong answer, so you can't fail! Your honest answers will help you determine whether or not you would be comfortable facilitating.

- Are you willing to listen to others without judgment or preconceived notions about what they should or shouldn't say or do?
- Do you show respect for the opinions of others even when they disagree with you?
- Can you release the need to have complete control of a conversation or other situations?
- Are you comfortable dealing with conflict?
- Are you comfortable speaking in public?
- Are you able to laugh at yourself?
- Can you ‘think on your feet’?
- Do you believe that groups working together are more proactive than individuals working alone?
- Can you accept feedback from others about yourself?

Answering *yes* to a majority of these questions indicates that you would be comfortable in the role of session leader.

If you answered *no* to any of these questions, don't be discouraged. It means these are the areas in which you'll need to work on, like a belief, an attitude, or an action.

During an Expectations Session, the session leader’s role is to:

- Manage agenda for the group to achieve the objectives
- Solicit comments from the group
- Listen to client expectations: you will ask questions of clarification but not respond with any problem-solving actions
- Protect the process and keep the session on track
- List expectations as expressed by the client

Face the group: Be efficient with writing on the wall charts so as you spend more time facing the audience.

Don't be afraid to cut off people who are doing too much talking: This can be hard to do the first couple of times, but it is necessary to be a successful session leader.

Honor agenda times: Your credibility and the trust level the group has for you are put at great risk if you don't honor these times. The only deviation should be at the suggestion and agreement of the group.

Call people by name: This practice will build trust and a personal relationship between you and your participants. It also makes people feel good, and people who feel good produce better work. If you aren't good with names, learn and practice until you are.

Use the space you're in:

- Standing allows you to *own* the space and move easily
- Standing can also be a power and control tactic and there are situations where that's undesirable. As you become a strong session leader, you'll discover you can be even more effective under certain conditions by being seated.
- Sitting at the end of a table conveys authority.
- Sitting along the side of the table with participants reduces authority.
- Don't favor one side of the room or one section of participants. Often your attention will be drawn to one area of the room or one section of participants. Be aware and be sure to look towards, talk to and listen to all portions of the room and audience.
- *Walk near* problem participants. If someone is being aggressive you can temper them by taking advantage of their personal space.
- Step away from shy, retiring participants while they speak, but keep your attention focused solely on them so that others will give them time to speak.

Know when to be quiet: To build the group's confidence and openness, look out for these behaviors:

- Answering too many *content* questions
- Not making the expectations visible and available for everyone
- Always having to have the answer
- Disrupting progress by taking the group on a tangent or forcing them to do it *your way*
- Being closed to suggestions
- Never interrupt or engage when clients are having their own dialogue. This dialogue within the client group is healthy in order to allow them to come to a consensus. The role of the session leader is to stand back and let the conversation conclude.

"Read" the group and respond: The group and the individuals in it are giving off continuous signals about their attention level, frustration level, participation level and enjoyment level. Learn to read the energy signals of both the group as a whole and the individual members and take appropriate action. Ask yourself *"What am I seeing or what am I sensing*?" If you aren't presently comfortable trusting your intuition, you can learn to trust it. You'll sense *energy flows* of the group or individuals being blocked. Ask yourself *Why*? Trust the first answer that pops into your mind. There may be a need for a break or for a few minutes of talk to clarify a task.

Never try to problem solve the expectations during brainstorming: This is one of the many facets of always preserving the integrity of the individual comments. Many times, as a problem solver, you'll see, in advance, what the solution is to the problem before you even possibly understand the full understanding of the issue.

Preserve the integrity of the group and every individual: You must never violate the integrity of the group or anyone in it.

Never

- Insult the organization or anyone in it
- Insult an outside organization or person
- Argue with a participant
- Ignore a participant
- Support deprecating remarks
- Take sides on an issue
- Endorse some participants and not others
- Disapprove of an action, comment, or behavior (watch body language)
- Admonish a participant or the group

Do

- Welcome all feedback from participants
- Allow all comments, even "the stupid ones"
- Take diversity training

Laugh at yourself: Force yourself to think "I'm not perfect!" and laugh. Laughter depersonalizes the comment or situation so that you can manage it.

Clarify when needed: Clarifying questions ask the person "who, what, where, when, and how." These are NOT "why" questions. They can be answered quickly and succinctly, often with a phrase or two. Probing questions asking the person "why" (among other things), are rarely used in an Expectations Session. Probing questions are open-ended. They take longer to answer, and often require deep thought on the part of the presenter before she speaks. The person asking the probing question doesn't know (or even assume) an answer to the question being asked and doesn't have an investment in how the question is answered.

Summarize or paraphrase: To be able to paraphrase, you need to be able to understand what the person has said to put it in your own words. Paraphrasing requires an individual to understand what they have heard. An effective way to become more comfortable with the concept of paraphrasing is to start using it on actual problems, so that you'll be more capable of using these techniques in front of your clients. Examples include:
"Let me see if I've understood you correctly… you are looking for…. Is that it?
"Let me see if this captures it….so then your expectation of Reliant is…."

You don't have to record every word, just record the idea or fact, but make sure you validate that what you have recorded is their idea or fact. Once the group sees that everything is being recorded, they tend to reduce their "talking for talk's sake" and that helps the session flowing.

Ask open-ended questions: That will provide you with information and invite your clients to further tell you what's on their minds and stops you from educating and/or offering your opinions.

Educating and/or offering your opinions while probing should be avoided for two reasons:

- If your opinion or suggestion is in conflict with that of your client, he/she will most likely be embarrassed, annoyed or even insulted by your educating style probing technique.
- If your opinion or suggestion goes beyond your client's expectation, you have just given yourself a greater project than the one your client had in mind for you.

Encourage more discussion:

- Please tell me more about…. Or if you can, please be more specific about the way in which…"
- "Help me understand what you mean…"
- "Please describe for me what …. means to you?"
- "Who would be the person responsible for….?"

Determine how we will be measured:

- "How would you know when XYZ is done/completed/started?"
- "How would you measure the ABC improvement/increase/decrease you just referred to?"
- "It is critical that we are able to express how success will be measured. By being able to measure something, we are then able to demonstrate achievement".

Be on the look-out for *"Watch Words:*" Like, Want, and Wish. These words precede very vague expectations that cannot be measured, and this is very often how clients describe their expectations. Keep in mind that this is an Expectations Session – not a blue-sky, wish-list, brainstorming meeting. This meeting is about what they expect to see happen, not necessarily about what they might be wishing for or want to see happen.
It is very important that the session leader does not become involved in defending, protecting or rationalizing any of the client's expectations. Now is not the time to negotiate but it is time to ask for clarifications.

Managing Disruptive Behaviors

The best results are obtained from any facilitated session when individual members of the group participate fully in the event. Realistically, as a facilitator you are likely to meet a variety of forms of non- participation from individual in addition to just not talking. You will come across disruptive behaviors such as interrupting, negativity, dominating the conversation and leaving the session mentally.

When faced with these, remember that most people are reasonable. They sometimes just get carried away, scared, excited or tired. Experienced facilitators reckon that:

- 95% of this behavior comes from people who feel they haven't been heard or listened to,
- 3% comes from people who have not learned to switch off,
- 2% from people who have an underlying life problem. You may not be able to figure out what is going on to cause their behavior, but you can learn to accept that there is a reason for the behavior.

Perhaps the one skill that demands the most from the facilitator is dealing with difficult people. It is fair to say though that it is generally not the people who are difficult but the way they behave.

Hecklers – are usually argumentative, aggressive, and probably insecure. They enjoy winding people up.

Tips for dealing with hecklers:

- Avoid getting upset.
- Find something that you can agree with, acknowledge them and move on.
- Wait for them to get something wrong, then hand it over to the group to put it right – remember they are probably trying to take you on, one-to-one, keep it with the group.

Talkers/know-all – tend to want to dominate the discussion and show off how well informed they are.

Tips for dealing with Talkers/know-all:

- Wait till they stop to take breath, thank them and move on.
- Ask the group to comment on their contribution.
- Use difficult questions to force them to think before talking.

Whisperers – may be bored, unable to understand, interested in sharing ideas or just plain mischievous.

Tips for dealing with Whisperers:

- Stop talking in mid-sentence and wait for the silence to bring them back to the group.
- Refer to any ground rules that you have set with the group.
- Ask them (with genuine interest) to share their thoughts with the group.

Non-contributors – may be bored or indifferent, shy or afraid

Tips for dealing with Non-contributors:

- If you suspect they are shy, try to increase their confidence by asking questions they should be able to answer easily.
- Refer to them by name – this is important for everybody in the group, but especially for those you need to bring out.
- If you suspect they are bored or indifferent, challenge them with difficult questions.
- Get them especially involved in the exercises and tasks you ask the group to do.