**LEARNER GUIDE COMMUNCIATION**

**Communicate verbally and non-verbally in the workplace**

**Unit standard 9960 Level 3 Credits 8**

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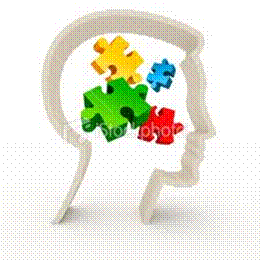
# PERSONAL INFORMATION

|  |  |
| --- | --- |
| ****NAME**** |  |
| ****CONTACT ADDRESS**** |  |
|  |
| ****Code**** |  |
| ****Telephone (H)**** |  |
| ****Telephone (W)**** |  |
| ****Cellular**** |  |
| ****Learner Number**** |  |
| ****Identity Number**** |  |
|  | |
| ****EMPLOYER**** |  |
| ****EMPLOYER CONTACT ADDRESS**** |  |
|  |
| ****Code**** |  |
| ****Supervisor Name**** |  |
| ****Supervisor Contact Address**** |  |
|  |
| ****Code**** |  |
| ****Telephone (H)**** |  |
| ****Telephone (W)**** |  |
| ****Cellular**** |  |

# **INTRODUCTION**

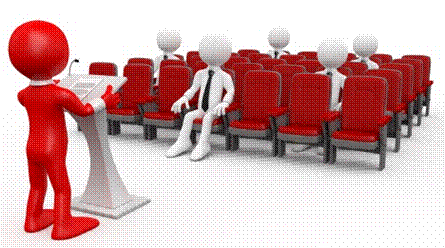
#### Welcome to the learning programme

Follow along in the guide as the training practitioner takes you through the material. Make notes and sketches that will help you to understand and remember what you have learnt. Take notes and share information with your colleagues. Important and relevant information and skills are transferred by sharing!



This learning programme is divided into sections. Each section is preceded by a description of the required outcomes and assessment criteria as contained in the unit standards specified by the South African Qualifications Authority. These descriptions will define what you have to know and be able to do in order to be awarded the credits attached to this learning programme. These credits are regarded as building blocks towards achieving a National Qualification upon successful assessment and can never be taken away from you!

## Programme methodology



The programme methodology includes facilitator presentations, readings, individual activities, group discussions and skill application exercises.

Know what you want to get out of the programme from the beginning and start applying your new skills immediately. Participate as much as possible so that the learning will be interactive and stimulating.

The following principles were applied in designing the course:

* Because the course is designed to maximise interactive learning, you are encouraged and required to participate fully during the group exercises
* As a learner you will be presented with numerous problems and will be required to fully apply your mind to finding solutions to problems before being presented with the course presenter’s solutions to the problems
* Through participation and interaction, the learners can learn as much from each other as they do from the course presenter
* Although learners attending the course may have varied degrees of experience in the subject matter, the course is designed to ensure that all delegates complete the course with the same level of understanding
* Because reflection forms an important component of adult learning, some learning resources will be followed by a self-assessment which is designed so that the learner will reflect on the material just completed.

This approach to course construction will ensure that learners first apply their minds to finding solutions to problems before the answers are provided, which will then maximise the learning process which is further strengthened by reflecting on the material covered by means of the self-assessments.

#### Different role players in delivery process

* Learner
* Facilitator
* Assessor
* Moderator

### What Learning Material you should have

This learning material has also been designed to provide the learner with a comprehensive reference guide.

It is important that you take responsibility for your own learning process; this includes taking care of your learner material. You should at all times have the following material with you:

|  |  |
| --- | --- |
| **Learner Guide** | **This learner guide is your valuable possession:**  This is your textbook and reference material, which provides you with all the information you will require to meet the exit level outcomes.  During contact sessions, your facilitator will use this guide and will facilitate the learning process. During contact sessions a variety of activities will assist you to gain knowledge and skills.  Follow along in the guide as the training practitioner takes you through the material. Make notes and sketches that will help you to understand and remember what you have learnt. Take and share information with your colleagues. Important and relevant information and skills are transferred by sharing!  This learning programme is divided into sections. Each section is preceded by a description of the required outcomes and assessment criteria as contained in the unit standards specified by the South African Qualifications Authority. These descriptions will define what you have to know and be able to do in order to be awarded the credits attached to this learning programme. These credits are regarded as building blocks towards achieving a National Qualification upon successful assessment and can never be taken away from you! |
| **Formative Assessment Workbook** | The Formative Assessment Workbook supports the Learner Guide and assists you in applying what you have learnt.  The formative assessment workbook contains classroom activities that you have to complete in the classroom, during contact sessions either in groups or individually.  You are required to complete all activities in the Formative Assessment Workbook.  The facilitator will assist, lead and coach you through the process.  These activities ensure that you understand the content of the material and that you get an opportunity to test your understanding. |

### 

### Different types of activities you can expect

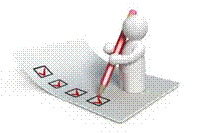
To accommodate your learning preferences, a variety of different types of activities are included in the formative and summative assessments. They will assist you to achieve the outcomes (correct results) and should guide you through the learning process, making learning a positive and pleasant experience.



The table below provides you with more information related to the types of activities.

| **Types of Activities** | **Description** | **Purpose** |
| --- | --- | --- |
| **Knowledge Activities** | You are required to complete these activities on your own. | These activities normally test your understanding and ability to apply the information. |
| **Skills Application Activities** | You need to complete these activities in the workplace | These activities require you to apply the knowledge and skills gained in the workplace |
| **Natural Occurring Evidence** | You need to collect information and samples of documents from the workplace. | These activities ensure you get the opportunity to learn from experts in the industry.  Collecting examples demonstrates how to implement knowledge and skills in a practical way |

### Learner Administration



#### Attendance Register

You are required to sign the Attendance Register every day you attend training sessions facilitated by a facilitator.

#### Programme Evaluation Form

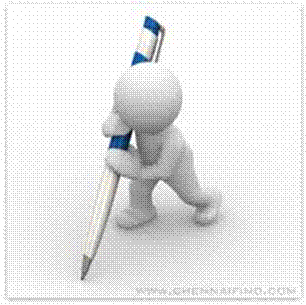
On completion you will be supplied with a “Learning programme Evaluation Form”. You are required to evaluate your experience in attending the programme.

Please complete the form at the end of the programme, as this will assist us in improving our service and programme material. Your assistance is highly appreciated.

### Assessments

The only way to establish whether a learner is competent and has accomplished the specific outcomes is through the assessment process. Assessment involves collecting and interpreting evidence about the learners’ ability to perform a task.

To qualify and receive credits towards your qualification, a registered Assessor will conduct an evaluation and assessment of your portfolio of evidence and competency.

This programme has been aligned to registered unit standards. You will be assessed against the outcomes as stipulated in the unit standard by completing assessments and by compiling a portfolio of evidence that provides proof of your ability to apply the learning to your work situation.

**How will Assessments commence?**

#### Formative Assessments

The assessment process is easy to follow. You will be guided by the Facilitator. Your responsibility is to complete all the activities in the Formative Assessment Workbook and submit it to your facilitator.

#### Summative Assessments

You will be required to complete a series of summative assessments. The Summative Assessment Guide will assist you in identifying the evidence required for final assessment purposes. You will be required to complete these activities on your own time, using real life projects in your workplace or business environment in preparing evidence for your Portfolio of Evidence. Your Facilitator will provide more details in this regard.

To qualify and receive credits towards your qualification, a registered Assessor will conduct an evaluation and assessment of your portfolio of evidence and competency.

### Learner Support

The responsibility of learning rests with you, so be proactive and ask questions and seek assistance and help from your facilitator, if required.



Please remember that this Skills Programme is based on outcomes-based education principles which implies the following:

* You are responsible for your own learning – make sure you manage your study, research and workplace time effectively.
* Learning activities are learner driven – make sure you use the Learner Guide and Formative Assessment Workbook in the manner intended, and are familiar with the workplace requirements.
* The Facilitator is there to reasonably assist you during contact, practical and workplace time for this programme – make sure that you have his/her contact details.
* You are responsible for the safekeeping of your completed Formative Assessment Workbook and Workplace Guide
* If you need assistance, please contact your facilitator who will gladly assist you.
* If you have any special needs, please inform the facilitator

### Learner Expectations

Please prepare the following information. You will then be asked to introduce yourself to the instructor as well as your fellow learners

|  |
| --- |
| Your name: |
|  |
|  |
| The organisation you represent: |
|  |
|  |
| Your position in organisation: |
|  |
|  |
| What do you hope to achieve by attending this course / what are your course expectations? |
|  |
|  |
|  |
|  |
|  |
|  |
|  |

# UNIT STANDARD 9960

This learning programme is aligned to the following unit standard:

#### Unit Standard

Communicate verbally and non-verbally in the workplace

#### NQF Level

3

#### Credits

8

#### Outcomes and Assessment Criteria

**Specific Outcome 1**: Select method of communication

**Assessment criteria**

* The communication method selected is appropriate for the target audience
* Barriers of communication are overcome

**Specific Outcome 2:** Communicate with subordinates

**Assessment criteria**

* Information is gathered from subordinates
* Instructions are given
* Feedback is received to confirm the effectiveness of the communication

**Specific Outcome 3**: Communicate with clients.

**Assessment criteria**

* Requests for information are made
* Confirmation of instructions is written
* Information is given in the prescribed format
* A conversation is engaged in to its logical conclusion

#### Critical cross-field outcomes

* Identify and solve problems - refer to the following assessment criteria: Barriers of communication are overcome.
* Work effectively with others - refer to all assessment criteria
* Employ self-management - refer to the following assessment criteria: Information is given in the prescribed format; Instructions are given
* Manage information - refer to the following assessment criteria: The communication method selected is appropriate for the target audience; Communicate effectively - refer to all assessment criteria
* Demonstrate scientific and technological competence - refer to the following assessment criteria: Information is given in the prescribed format; The communication method selected is appropriate for the target audience
* Understand contextual world-systems - refer to the following assessment criteria: The communication method selected is appropriate for the target audience; Barriers of communication are overcome; A conversation is engaged in to its logical conclusion

#### Unit Standard Essential Embedded Knowledge

* Various ways of communicating verbally and non-verbally
* Communication as a two-way process
* Barriers to communication
* Greetings and leave taking conventions
* The required formats for written communication; including - letters, instructions, and requests for information

#### Learning Assumptions

FETC NQF Level 2 literacy and numeracy competencies

# SECTION 1: SELECT METHOD OF COMMUNICATION

#### Specific outcome

Select method of communication

#### Assessment criteria

* The communication method selected is appropriate for the target audience
* Barriers of communication are overcome

## Introduction To Communication

Good communication is vital to any organisation. Managers spend up to 75% of their time communicating with other people and can therefore be regarded as one of the most important skills that a manager has to acquire.

In any communication process there is a communicator, a message, a receiver of the message and feedback.

### The Communication Process

*Message*

**Communicator** **Recipient**

*Feedback*

#### The Communicator

starts the communication process by conveying a ***message*** about what he feels, thinks or believes about a matter that he wishes to share with others.

#### Message

The ***message***is that which the communicator wishes to convey to others by way of communication and can be used by the communicator to attempt to persuade someone to his way of thinking, or it can be an idea, thought or feeling that the communicator wishes to share with others. This message needs to be communicated in some form, for while the message remains a thought in the communicator’s mind it cannot be received or interpreted by a recipient.

#### The Recipient

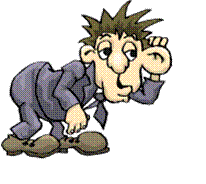
receives the message, interprets it and reacts. This reaction is called *feedback.* Feedback gives the communicator an indication whether the message was understood or not.

#### Feedback

***Feedback*** is not always verbal, but can also be conveyed by means of other reactions e.g. applause after a good performance, joy after receiving good news or even a bloody nose after insulting someone.

#### Noise

Noise is distraction that reduces the effectiveness of the communication process. Noise can be anything that causes the message to be misheard or misinterpreted:

* The receiver not listening to the communicator and the message.
* The communicator not formulating the message properly.
* Actual noise, such as a car horn or a bus passing so that the recipient cannot hear the message.
* Misuse of language so that the message is obscured.
* Talking while the communicator is conveying the message – you cannot listen while you are talking.
* Someone else interrupting the receiver while the receiver is receiving the message.

All the above can go wrong during the feedback process as well. Feedback is an essential part of communication and must never be underestimated. The communication process is not complete until feedback is given.

Below is an example of two small children talking and it shows how noise can distort the message and the feedback and lead to immense misunderstanding:

**Ronnie: “I am going to sing for you on your birthday.”**

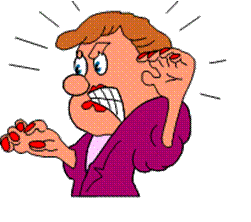
**Alex:” Is it my birthday? Where are my sweets?”**

**Ronnie: “I don’t know where your sweets are.**

**Alex: “But then they must also give me sweets at school and sing to me at school. Are you also going to sing to me at my school?”**

**Ronnie:” No, I am not going to school with you, I don’t want to go to your school.”**

**Alex: “But that’s not what I’m asking you.”**

**Ronnie” But I don’t want to go to your school.”**

**Alex: ’But that’s not what I’m asking you.**

**Ronnie” But I don’t want to go to your school.”**

The children involved were three and four years old and the example might seem silly but adults can also miscommunicate in the same way: noise distorts the message, both the communicator and recipient get the wrong impression and before you know it, an argument between two people erupts.

As an employee, one of your functions will be communication and you will have to ensure that you improve your communication skills to such an extent that you can identify noise and the impact it can have on communication so that you can identify whenever a message or feedback is distorted.

This means that when you as the manager are the communicator, you have the responsibility to ensure that the recipient understands the message. When you are the recipient, you have to ensure that you understand the message correctly.

### Barriers To Effective Communication

One of the first steps to achieving more effective communication between people is to recognize and understand why misunderstandings occur in the first place and then learn how to minimize or avoid them.

* Failure to analyse the needs of the receiver
* Poor listening, and lack of attention to feedback
* Assuming that the receivers know more than they really do
* Insensitive behaviour on the part of senders and receivers
* Different cultural backgrounds
* Lack of intercultural understanding
* Too many people to pass on the message from sender to the receiver, which results in distortion of the message because people filter these messages as they pass them on.
* Poor feedback, with filtering, omissions and errors as messages are passed on
* Insensitive or poor choice of language by sender or receiver
* The sender’s information may be insufficient or not clear enough
* Poor planning of information
* Wrong emphasis in the information, so that the receiver does not know what the most important parts of the message are.
* Messages that are so packed with information that they are difficult to interpret and process.
* Different perceptions of situations and meanings of messages.
* Poor interpersonal skills, in particular, poor listening, distorted perceptions of others and insensitivity to non-verbal communication.
* Lack of understanding of what messages mean because people do not share the same meanings.
* Inability to distinguish between fact and opinion.

### Improve Your Communication Skills

#### When you are the recipient

Improve your listening skills

* **Stop talking**: You cannot listen if you are talking.
* **Help** a person feel free to talk
* **Show a talker that you want to** listen: look and act interested. Do not read your mail while someone talks.
* **Listen to understand** rather than to oppose.
* **Remove distractions**: Don't doodle, tap, or shuffle papers. Will it be quieter if you shut the door?
* **Empathise with talkers**: Try to help yourself see the other person’s point of view.
* **Be patient**: Allow plenty of time. Do not interrupt a talker. Don't start for the door or walk away.
* **Hold your temper**: An angry person takes the wrong meaning from words.
* **Do not argue or criticise**. This makes people defensive, and they may stop listening or talking, or even become angry. Do not argue: Even if you win, you lose!
* **Ask questions**: this encourages a talker and shows that you are listening. It helps to develop points further.
* **Stop talking**! This is the first and last, because all other guidelines depend on it. You cannot do an effective listening job while you are talking.

“God gave us two ears, but only one mouth.

Does this mean that we should listen twice as much as we talk?”

#### Active Listening

An important aspect of communication is to listen actively.

Listening should be active, not passive. There are several ways in which listeners can exert control in a discussion and prevent more powerful, educated or argumentative speakers from dominating the negotiation.

* **Restate the speaker's points** as you understand them, forcing him/her to clarify cloudy areas
* **Do not respond**, or continue to make non‑committal responses until the speaker develops his argument more specifically
* **Paraphrase the speaker's words**, exposing the hidden cultural assumption and/or feelings of superiority.
* **Ask questions** that will bring the discussion back to the basic conflict of interests if this is being blurred.
* **Take notes** and ask the speaker to repeat phrases that are not clear
* **Pay attention to everything that is said – not just what you are looking for.** Remember that a discussion is an exchange of individual ideas rather than logical interaction.
* **Listen for what the other person means, not just what you think he/she means.** Remember that the other person means something and that the actual words may be misleading.
* **Focus on what the customer is saying, rather than what you are going to say.** Remember that the purpose for the call is to give the customer an opportunity to express her ideas, and not just to get her to see your point of view. Let the customer ramble if need be – good information will usually result.
* **Focus on content.** Try not to let factors such as tone of voice and body language impede your active listening process. Pay attention to these things too, of course, but keep them in perspective.

Surveys show individuals listen about 25% of the time.

You recall only 50% of what you hear when you actually listen.

70% of all misunderstandings happen because people do not listen to each other.

If we do not upgrade our listening skills, we increase the potential for conflict to occur.

***Two men were walking along a crowded sidewalk in a downtown business area.***

***Suddenly one exclaimed, “Listen to the lovely sound of that cricket!” But the other could not hear. He asked his companion how he could detect the sound of the cricket amidst the din of people and traffic.***

***The first man, who was a zoologist, had trained himself to listen to the voices of nature, but he did not explain. He simply took a coin out of his pocket and dropped it on the sidewalk, whereupon a dozen people began to look about them.***

***“We hear,” he said “what we listen for.”***

#### Verifying

When you verify what was said – rephrasing and confirming – you have the chance to spot gaps in your own understanding and to double-check that you understood the message.

By repeating the other person’s own words to him tells him that you heard his **words.**

Confirm the person’s message in order to determine whether or not he agrees that your restatement of information was accurate and that he has understood you.

* Is that what you meant?
* Have I understood the key aspects of this situation?
* Is that a fair restatement of the situation?
* Is that how you might rephrase it?
* Is that close to what you mean?

#### When you are the communicator

**Guidelines for better explaining**

* Make each explanation sound fresh and spontaneous
* Make your explanations conversational and descriptive
* Be direct with recommendations, but not directive
* Be enthusiastic
* Value your customer’s style of interaction
* Be truthful
* Avoid jargon

**Know what you want to say before saying it**

* Plan your communication
* Think before you communicate

**Allow a margin of time in which to communicate**

* Avoid rushing communication. Take your time
* Avoid communicating just before knock off time

**Be clear and concise. Keep it simple. Keep it short.**

* Use words people will understand
* Watch out for “jargon”

**Use a level of language that will be understood**

* Remember English is not everyone’s first language

**Feedback**

* Get feedback
* Give feedback

It is the duty of anyone involved in communication to make an all-out effort to ensure that all communication is as successful as possible.

### The Medium of communication

To quote the trusted Oxford dictionary once again, a medium is**.” a means by which something** is communicated or achieved.”

We can divide media into these groups:

* Those used in **intrapersonal communication.** As we will see later, this is communication where the communicator and recipient are the same person i.e. yourself. The medium that carries intrapersonal communication is the nervous system. It carries information from the senses to the brain. The brain interprets the information and sends information back to the body to react
* Those used in **interpersonal communication.** This is when there is personal contact between the communicator and the receiver and interaction is immediate and constant. Examples can include speech, personal or telephonic, listening, looking, sign language, touch, body language, etc.
* The media that carry **works of communication.** This includes memos, letters, books, newspapers, magazines, reference manuals, etc. where the information is stored in the form of any of the above. This information can then be accessed at the receiver’s leisure. A feature of this form of communication is that there is record of the communication and can be referred to again in future.
* The **mechanical and electronic media.** Radio, television, intranet, internet, e-mail, SMS’s, etc. are examples of this form of communication. Once again, there is record of this form of communication.

You need to use the **medium of communication best suited** for what you are communicating to whom, to be an effective communicator. When you inform someone of a meeting you send him a memo or e-mail, so that there is record of the communication. He cannot now say that he was not informed of the meeting.

## Written Communication

Should you communicate telephonically, in person, by means of a business letter, a fax, a report or an e-mail?

That would depend on the type of communication you received. You would usually reply to the client in the same format that the client requested information from you.

* If it is a telephonic enquiry, the normal procedure would be to reply by telephone and then follow up with a written communication. It is always important to have a written record of the communication that took place.
* If the enquiry was by fax, reply by fax.
* If the enquiry was by e-mail, reply by e-mail
* If the enquiry was in the form of a business letter, reply by business letter
* A reply in report format would only be done if a report was specifically requested
* The above are the usual ways of responding to clients, however, you must be guided by the procedures in your organisation. If your organisation wants you to reply by e-mail, then that is what you have to do, provided the client has e-mail

### Identify Main Points

**Once again, consider:**

* The purpose of the writing.
* The needs of the audience.

So that you can identify the main points of your writing. Once you have identified the main points, you can add the supporting details. Remember to structure your sentences, paragraphs and document in a logical manner.

### Select the format and structure

When you are writing a document for business, you always have to select the appropriate format. If a client writes to you to find out about a specific range of products or services, giving them a report of 20 pages about the advantages of wearing a specific shoe, will not help the client to decide which style or colour of shoe he wants. You would rather send the client a brochure giving details of a range of shoes, with the available colours, sizes and uses. Only if the client wants more details about a specific type of shoe will you think of sending a report.

The structure of the text should also suit the specific document you are writing. We do not usually include visual aids, slogans and sales hype in business letters – these are included in brochures and advertisements of the products.

Each kind of business document has its own purpose and depends on what the client is asking you and what the purpose of the communication is.

So, when you are writing a business document and you have to send it outside the company, before you start writing, consider:

* The purpose of the writing.
* The needs of the client.
* The type of business document you will use.
* The register: formal or informal.
* The style of writing.
* What information to include and what to leave out.

### Business Correspondence

There are many forms of business correspondence, however the types most used will be discussed shortly.

#### Business Letters

Business letters can be formal and informal and are sent to parties outside the business. Internal correspondence is usually done on a memorandum.

There are many kinds of business letters such as:

* Enquiries and replies.
* Orders and follow-up letters.
* Claims and adjustment letters.
* Employment letters.
* Letters giving information about products and services.
* Letters to the press.

The layout of the letters will all be more or less the same but the style and register will vary depending on the industry and the corporate culture. Banks, insurance companies and legal firms tend to compose business letters using the formal register, while other companies and industries tend to use a less formal style that is a mix between the formal and informal register.

Hand-out 9 contains an example of a business letter.

#### Memorandum

A memorandum is an informal, written piece of information which is intended to remain within an organisation. These days the abbreviation memo is used for the short inter-office memorandum.

A memo would also usually be printed on a letterhead and will have a definite layout as required by the organisation.

Hand-out 10 contains an example of a memo. The same rules when composing a business letter will apply when you write a memo to someone else in the organisation:

* Plan what you want to say.
* Collect background information.
* Sort your ideas and facts.
* Take care how you construct your paragraphs and sentences.

Memos are not usually signed, unless required by the organisation

#### Report

Report is a comprehensive term for written information based on facts and can cover many topics.

A report is an objective, well-structured, written document based on accurate facts with the purpose of conveying specific, useful information to its readers. A report is unique: no two reports are the same.

In the business world, a report will usually be as a result of something that was investigated or researched, such as the implementing of a new computer system. The custom in the organisation will determine whether the report is written in the formal or informal register.

Reports usually consist of the following: (see hand-out 11)

* A cover page.
* A title page.
* Introduction and statement of the aim of the report, also called the terms of reference.
* A brief summary of the main contents.
* A table of contents.
* Procedure followed during the research or investigation.
* Findings and conclusions as a result of the research or investigation.
* Recommendations based on the research or investigation.
* Bibliography.

Reports are usually long and lengthy documents. Remember to make use of the following:

* headings
* titles
* subtitles
* paragraphs
* numbers and bullets in your document
* visual aids

#### Fax

A fax is a method of sending business correspondence via a fax. Most organisations today have a standardised form for use when sending a fax. Faxes should usually be signed, since it is a document that represents the organisation and the person sending it. However, check what the custom in the organisation is before you sign a fax.

Hand-out 12 contains an example of a fax

#### e-mail

Will take the format of either a formal business letter or a memo, depending who the e-mail will be sent to.

# COMMUNCIATE WITH SUBORDINATES

#### Specific outcome

Communicate with subordinates

#### Assessment criteria

* Information is gathered from subordinates
* Instructions are given
* Feedback is received to confirm the effectiveness of the communication

## Communication Within The Organisation

### External communication

This is communication between the organisation and the environment outside the organisation. This would be communication to clients, competitors and government organisations. Advertisements, promotions, press releases, public gatherings, quotes, invoices, payment advices are examples of external communication.

### Internal communication

#### Intrapersonal communication

This is communication with yourself – your thoughts about your work, your colleagues, your family and so on. In the environment of an organisation this would be when managers receive, process and transmit information to themselves. This is not as silly as it sounds: when you note an appointment in your diary, reminders of the diary and preparation for the appointment would all be intrapersonal communication.

#### Interpersonal communication

Is communication between two or more people on a person to person basis. This would include meetings, interviews, telephone calls, e-mails and memos.

#### Organisational communication

This is communication between different departments or companies in the same organisation. This would also include meetings between departments or companies, memos, e-mails and telephone calls to other departments.

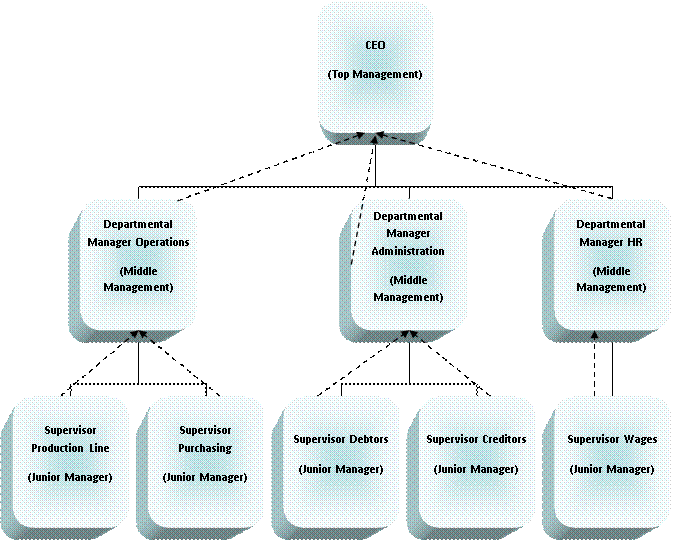
### Communication Structure

#### Formal network

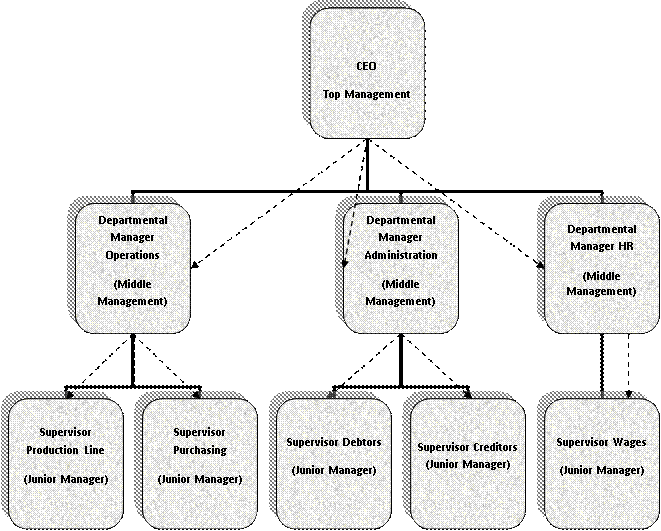
This follows the hierarchy of the organisation, the formal, official, established lines of contact.

Formal communication flows in four directions:

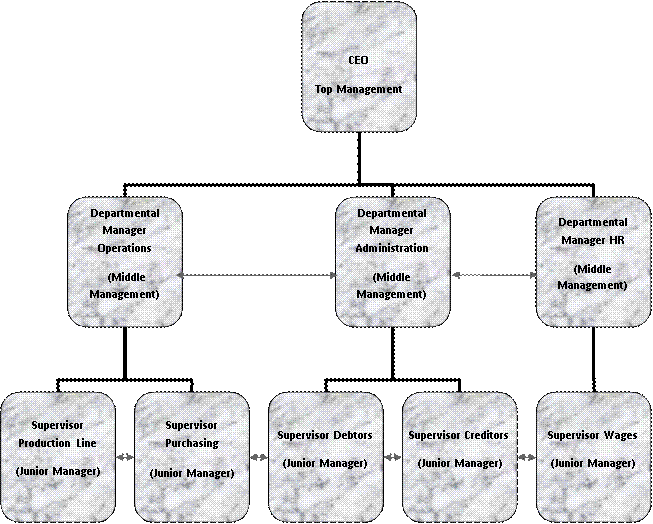
* **Upwards**: from the employees to junior management to middle management to top management. The purpose is to give information to the upper levels of the hierarchy. Examples could be customers who have problems or praise, possible new customers, ideas from employees and junior management regarding market trends and so on.



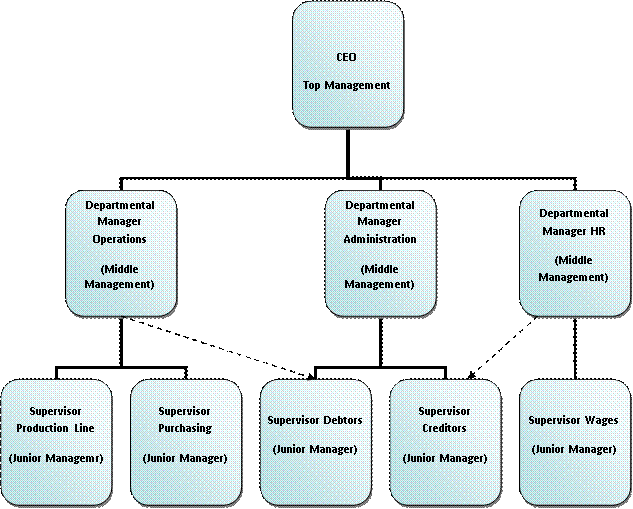
**Downwards**: from top management to middle management to junior management to employees. The purpose of this communication is to provide employees in the organisation with information on goals, strategies, policies, news releases, new product launches and so on. This communication is stopped, analysed and filtered at each level in the hierarchy.



**Horizontally**: between managers or employees on the same level in the hierarchy. The main purpose of horizontal communication is to ensure cooperation between departments, sharing of information etc. Meetings are a good example of this.



**Laterally** or diagonally: takes place between people on different levels of the hierarchy. When a manager of one department communicates with a junior manager or employee in a different department. It has to be said that this would not normally be the case – if you want to communicate with employees of a different department, you would usually have to do this via the department or section manager. The purpose is to provide information, coordination or assistance. An example is when someone from the HR department has a meeting with a department to explain new labour policies or laws to workers on the production line. Proper communication channels are not followed since it is done with the approval of the departmental manager.



#### Informal network

Does not follow the hierarchy of the organisation. The channels develop out of relationships between employees and management. It is usually called the grapevine and management has no control over it. Rumours that are spread in an organisation are done through the grapevine, rumours and the grapevine are actually the same thing.

Be careful of rumours that are communicated through the grapevine: they usually contain an element of the truth but can be distorted by people’s perceptions. Whenever you hear a rumour through the grapevine, always check the facts first before reacting.

### Importance Of Communication at The Workplace

Information is: past or present facts, observations, or conclusions collected in numbers and words. On its own it is limited, as information needs to be processed for specific use.

#### What is information used for in the workplace?

When you gather, record and convey information, you are required to possess particular skills: interpersonal or people skills, reading and writing skills and presentation skills.

Interpersonal communication is not confined to a single aspect of our lives. We communicate interpersonally every time we interact with others, i.e. both on an individual and group level. Effective interpersonal communication enhances output, both short term and long term.

Communicating effectively ultimately determines how successful we become

### Exercise individual self-assessment SO2

* Who do we communicate with in the workplace?
* What do you believe are your personal strengths and weaknesses in interpersonal communication?

#### Interpersonal skills

* **Listening** to the other party as you record and relate information.
* **Speaking** in order to build the two-way relationship between you and the receiver.
* **Questioning** to confirm or gain more information.
* **Demonstrating** your skills and knowledge in the subject matter will assist you to be confident and others to trust your information. This establishes credibility and professionalism.
* **Body language** is effective in communicating your message, it adds or detracts from your communication and credibility. It must be positive and encouraging.

#### Attitude

When you gather, record and convey information it is worthwhile combining the skills and knowledge with a positive attitude.

Describe a “Positive Attitude and how it impacts on Interpersonal Communication.”

### Communicating To Encourage A Constructive Response

#### Timing

* The timing of your communication needs to be well thought out. Look at it from both your perspective and that of your receiver.
* Be in a relaxed frame of mind and not pre-occupied with other thoughts.
* Avoid interruptions.
* Ensure privacy when dealing with personal matters.
* The same principles can equally be applied to the receiver. The receiver must be in the frame of mind to receive your message, and if need be discuss or process it with you.

#### Environment

* Have a non-threatening atmosphere.
* Help people feel physically and mentally comfortable and relaxed.

#### The use of Verbal, Vocal and Visual

Three elements that are communicated each time we speak:

* The **verbal** is the message itself - the words that you say.
* The **vocal** element is your voice - the intonation, projection and resonance of the voice that carries those words.
* The **visual** element is what people see - basically what they see of your face and your body.

### Guidelines when asking questions

* Your questions should have a purpose, that is, be goal directed.
* Time your questions so that you do not interrupt the speaker’s thinking process.
* Ask questions that are clearly worded, avoid ambiguity or a question with more than one answer.
* Your questions should have answers. In other words, there is little point asking a question when the person is unable to respond or it places them in an uncomfortable position.
* During conflict when emotions usually run high, avoid emotive or leading questions that disclose your bias and feelings, as this often adds fuel to the fire.
* Word your questions in a descriptive manner. Being descriptive, it is much less likely to cause animosity as you are being specific and non-judgmental.

### Summary Of Effective Interpersonal Communication

#### Clarify your thinking:

* Analyse the problem or idea to be communicated until it is clear in your own mind.
* Decide what you want to achieve and plan your communication to achieve it.
* Organise your ideas. Discuss and review your points with others before expressing them.

#### Obtain favourable attention:

* Have the receiver’s full attention to ensure you achieve your communication objectives.
* Ensure the receiver’s desire to understand the message.

#### Make it simple and specific:

* Phrase your message in simple terms.
* Be conscious of the experience level and the language which the receiver will readily understand.
* Make the message concise, with its purpose obvious.
* Make sure the message cannot be misinterpreted.
* Be specific.

#### Make effective use of feedback:

* Follow up your communication.
* Ensure the receiver actually did receive the message you meant him/her to receive.
* Observe his/her non-verbal communication.

#### Use “you” appeal:

* Use “you” and “your”. Ignore the words “I” and “my”.
* Express your message from the receiver’s viewpoint.
* Phrase the message in terms of his/her interest.

#### Note social climate and specific situation:

* Timing must be appropriate.
* Physical setting must be considered.

#### Include benefits to the receiver:

* Ensure the receiver knows “what is in it for him/her”.
* People will act to obtain benefits which will satisfy their particular needs and wants.

#### Consider tone as well as content:

* Watch your tone of voice.
* Remember that body language and facial expressions will affect the receiver’s reactions.

#### Always plant mental pictures as goal images:

* Plant vivid and attractive mental pictures in the mind of the receiver.

#### Talk only in positive terms:

* Remember that talking in positive terms avoids any possibility of planting the wrong goal image in the receiver’s mind.

#### Impress, repeat, associate, to get retention:

* Ensure that the message is retained in the receiver’s memory and that he/she can recall it readily.
* Deliver the message with sufficient emphasis and conviction.
* Repeat when necessary.
* Have patience.

#### Offer and earn liking and respect:

* Show liking for the receiver.
* Respect the receiver’s viewpoint.
* Conduct yourself in a way that earns you his liking and respect.

#### Nullify barriers to transmission and reception

Identify, nullify, and overcome any other barriers to communication.

### Barriers to communication of messages

Let us now consider the major barriers to effective communication of *messages.*

All those sending, receiving or passing on messages need to ensure that the message is:

* Accurately heard or read and understood
* Believed
* Acted on

However even when people communicate with the greatest goodwill, messages can be distorted because of ambiguity or lack of understanding of the meaning.

The following are some of the major barriers to effective message flow. If you have experienced any of the barriers listed below place an (X) next to the appropriate one.

|  |  |
| --- | --- |
| **BARRIERS** | **(X)** |
| The number of stages through which a message has to go |  |
| The amount of time allowed for the message to move through the Organisation |  |
| Lack of understanding of what the message means |  |
| Shortening of messages because people cannot be bothered to share full information with others |  |
| Filtering of messages at each stage (each person judges what the next person should receive) |  |
| Deliberate distortion (people send only what they want others to receive. They leave out information that they perceive as damaging to themselves) |  |
| Too much information is received at any one time. This is called overloading of information. |  |
| Not enough information is received at any one time. This is called under loading of information |  |

### Feedback

Almost all aspects of communication involve feedback - giving and receiving information.

By giving clear and concise feedback, individuals, team members and the entire institution will benefit.

#### So, what can we do to obtain feedback?

The best way of obtaining feedback is simple. Just ask open ended questions instead of closed ended questions. For example, if you were to say 'Do you understand?" you would probably just get a "Yes", whether that person understood or not. This is a closed question that forces the receiver to give a yes or no answer.

On the other hand, if you were to say "Please explain clearly any aspects of what I said that you are not sure of', this is an open ended question. It is very likely that you would receive far more than just a yes or no, which was all you got from your closed question of "Do you understand?"

#### Lack of feedback is causing a slight problem

Cultivate the habit of asking open ended questions, and you will find that you will turn feedback into the key that will open the door to greatly improved communication.

Because feedback is so important, we have made it the subject of the Self Check exercise for this module on communication. This will provide you with some practice in asking open ended questions.

# SECTION 3: COMMUNICATE WITH CLIENTS

#### Specific outcome

Communicate with clients

#### Assessment criteria

* Requests for information are made
* Confirmation of instructions is written
* Information is given in the prescribed format
* A conversation is engaged in to its logical conclusion

## Determine The Emotional State Of The Customer

### Verbal Communication

Much of your emotional state is reflected in the way that you speak. The tones, pitch, pace and volume of your voice can determine how a listener will interpret what you are saying.

By controlling these vocal characteristics you can become a more effective speaker.

The **tone** is the sound of your voice e.g. bright or deep, and expresses your feeling or mood. A bright tone will indicate feelings of excitement, joy, etc. while a deep tone will indicate feelings of placidity or sorrow.

**Pitch** is determined by the tension on your vocal cords, i.e. how high or low your voice sounds. Generally you will speak at a high pitch when excited and at a lower pitch when relaxed.

The **pace**or speed at which you speak can also be influenced by your emotional state. When you are telling someone that you have won the Lotto you will talk much faster than when you are telling him that you cannot attend a major sporting event.

You need to adapt the **volume** of your voice to the environment. Factors such as:

* being indoors or outdoors,
* number of listeners in a room,
* the size of the room,
* background noise and
* availability of amplification

will determine the volume at which you speak.

The **volume** of your voice can also indicate whether you are excited or relaxed, angry or friendly.

When communicating with a client/caller you must always be aware of these characteristics.

* By actively listening to what the client/caller is saying
* and the way in which it is said

You can determine his emotional state and thus prepare yourself as to what you are going to reply and how you are going to do it.

### Active Listening

Paying attention and focusing on what the speaker says and comparing that to your own experiences

Active listening a **skill** and is as important as giving orders in obtaining results.

* Give your full attention to what is being said.
* Make sure that you really understand.

### Listen between the lines

* Look for non-verbal clues.
* Mentally summarise and evaluate objectively.
* Be empathetic.
* Determine whether he expects: guidance, support, motivation, action or silence.

### What Makes A Good Listener?

This is actually a question of feedback. Good listeners use a variety of non-verbal and minimal cues to keep the other person talking. These include the use of phrases such as:

* “Yes”
* “I understand”
* “And then what”
* “Tell me more”
* “If I understand you correctly…”

Although the above illustrates how your natural reactions to different states of emotion can influence the manner in which you speak, it must be mentioned that you can intentionally alter some or all of these factors to enhance what you are saying.

Do not to overdo such variations as this might have exactly the opposite effect on what you are trying to communicate.

When communicating with someone else you must always strive to do it as **naturally and evenly** as possible. Be yourself!!

## Body Language

### Nonverbal Communication

There are many different types of nonverbal communication but for the purpose of this unit standard we are going to deal with nonverbal communication that directly interacts with verbal communication.

When communicating verbally you can express different feelings without even noticing or voicing these feelings. It is important that you know what these signals are and to be aware that you are also communicating these signals to the people you are communicating with. Just as important is that you recognise these signals that others communicate to you.

Some of these signals are:

### Handshake

This normally conveys a first impression of the person you are dealing with. A firm handshake will illustrate confidence and gets the other person’s attention. Hold on to his hand a little longer than is necessary to keep his attention. A sloppy handshake will, in contrast, can be interpreted as a sign of insincerity and/or laziness**.**

### Eye Contact

Much can be interpreted by eye contact or the lack thereof.

* **Direct eye contact** and a friendly expression will indicate openness and honesty. Always look the other person in the eye and maintain eye contact to show the speaker that you are listening.
* **Lack of eye contact** can mean that the listener is not paying attention, is bored with what you are saying or is uncomfortable with what you are talking about. Not making eye contact can also indicate dishonesty and distrust.

### Gestures

It is normal to make hand gestures during conversation to emphasise a point, but there are other gestures that convey your inner feelings without you making them consciously.

These include hand-, foot- and leg activity. Restless hands or shaking of the legs or feet can be a sign of agitation or nervousness.

### Posture

Sitting or standing straight will indicate that the listener is alert and paying attention, while slouching in a chair or leaning against a wall or door is a sign that the listener is not really interested in what is going on.

### Touch

Be very careful of this one as it can very easily be misinterpreted, especially in a working- or business environment. A hug and a “high-five” between winning team mates is an expression of victory or celebration, while stroking a secretary’s neck when dictating a letter to her can be seen as sexual harassment.

### Distance

All of us need personal space and when someone else invades that space we feel uncomfortable and threatened. Personal space is the distance between yourself and the person you are talking to.

The space between close friends or relatives will be much closer than the space maintained by a company director and a subordinate or opposing parties in an argument.

Determine what personal space is appropriate in a situation and maintain that space. Never intrude on someone else’s personal space, as this will make the other person feel threatened and distract his attention from what is communicated.

### Nonverbal Messages

**A nonverbal message can function together with a verbal message in the following ways; -**

A nonverbal message **reinforces** the verbal message by adding to its meaning. Banging your hand on the table while reprimanding someone conveys a stronger message than words alone and adds emphasis to your statement and captures the listener’s attention.

A nonverbal message can **complement** a verbal message when it conveys the same meaning. A greeting in a friendly tone of voice, accompanied by a warm smile will compliment your verbal message.

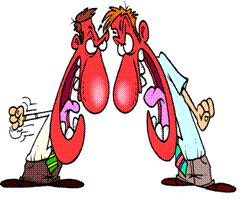
A nonverbal message may **substitute** the verbal message. When you arrive home and are irritable and impatient it is not necessary to tell anyone that you had a terrible day at work. Likewise, a passionate hug and kiss will tell your spouse that you love him/her without you having to say it.

Nonverbal behaviour functions to **regulate** the flow of verbal interaction. Slight hand movements, eye contact, tone of voice, nodding of the head and other nonverbal behaviour tells the recipient to talk, repeat a statement, hurry up or finish the conversation. For example, the chairperson at a meeting uses eye contact or hand gestures instead of words to indicate whose turn it is to speak.

A nonverbal message can **accentuate** what is said. While addressing an audience a speaker may talk louder and wave his finger in the air to stress a point that he is making. Speakers at political meetings are very good at this.

A nonverbal message may **contradict** the verbal message. This happens when a speaker says one thing but does another. A new company executive about to make his first presentation to the board of directors may claim not to be nervous despite his trembling hands and sweating forehead. Contradictory cues often tell us when someone is being sarcastic or merely teasing.

## Adjust Own Tone, Pitch And Volume In Empathy

It is a fact of life that during interaction with clients, at some stage or another there is going to be some sort of conflict. This may be due to a variety of reasons.

When dealing with any client it is important to adjust your own tone, pitch and volume of your voice to reply to both verbal and nonverbal messages in such a way so as not to offend the client in any way.

A satisfied client thanking you for going the extra mile will normally speak in a relaxed and friendly manner, using warm tones and speaking at a moderate pitch and pace. It is easy and pleasant to reply to this client’s messages as there is no aggression or threatening behaviour from his side and there are not many variations in the verbal and nonverbal messages he is communicating and therefore you can conduct a relaxed conversation.

Dealing with an irate client is slightly more complicated as he is upset about something and his emotional state can change at any time.

Such a client must be handled carefully and considering and using the following simple guidelines can assist you to do this successfully.

* **Acknowledge the conflict** – speak in a neutral tone and pitch and beware not to be drawn into a shouting match as this will only serve to aggravate the situation. DO NOT ARGUE AND DO NOT TELL THE CLIENT NOT TO SHOUT AT YOU!!
* **Listen actively** – be aware of verbal and nonverbal cues as to the emotional state of the client. Talking rapidly at a high pitch and tone, vigorous hand gestures and fidgeting will indicate irritability.
* **Reply with empathy** – when dealing with an irate client you don’t fight fire with fire. Let the client experience your empathy by speaking calmly even if he is excited. Do not raise your voice although you might feel irritated yourself. Allow him to voice all his frustration and be ready with suggestions for a workable solution to the problem. Keep the discussion issue-orientated and don’t get personal.

## Extract The Main Idea

It is essential to have a clear grasp of what the client’s needs are so that you can address those specific needs and not waste time on irrelevant issues as this can further aggravate your client.

In order to achieve this you need to create an atmosphere that is conducive to listening.

* Maintain eye contact to indicate sincerity.
* Also use nonverbal cues such as a nod of the head to indicate that you understand what is said. This will make it easier for the client to continue and focus on the issues at hand.
* Repeat the main issues to show the client that you are taking notice of what is said and that you are committed to finding a solution to his problems.
* Focus on these issues and make notes to help you remember them.
* By summarising what the client said in your own words will indicate to the client that you are paying attention. It will also help clarify any misinterpretation of what the client said and assist you to concentrate by actively involving yourself in the process.

## Ask Questions

Often the client will not reveal all the details of what a problem is. It is then necessary to determine the full extent of the matter by asking relevant questions to clarify his need. Make sure that these questions are to the point and can once again be summarised in your own words to express understanding and commitment.

Certain types of questions will be more helpful than others:

### Open Questions

These generally begin ‘How …?’ ‘What …?’ “Where …?’ “Who …?’ They require a fuller answer than ‘Yes’ or ‘No’. They may be used to**:**

?

* Gain information: ‘What happened as a result?’
* Explore thoughts, feelings, attitudes and opinions: ‘What were you hoping to achieve?’ “How are you feeling having done that?’ “What’s your view on that?’
* Consider hypothetical situations and explore options: ‘What would help?’; ‘How might you deal with …?’; ‘What are the possible options for …?’
* ‘Why?’ questions are useful open questions, but can sometimes be less helpful if they sound too much as if they are judgmental – seeking justification for action. In such circumstances they can sound moralising: ‘Why did you do that?’

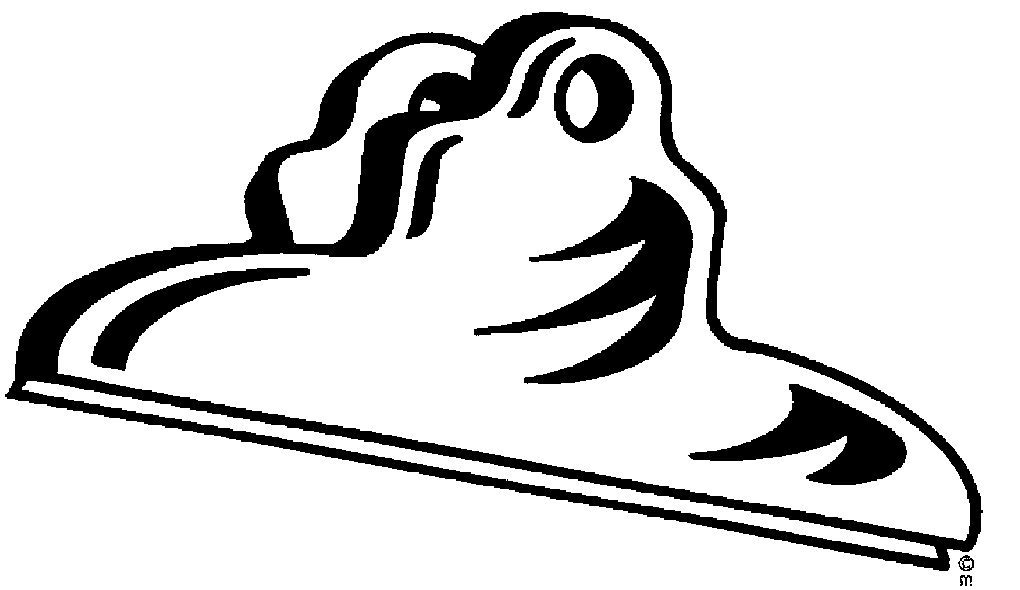
### Closed questions

These invite a ‘Yes’ or ‘No’ answer and as such may unhelpfully close down the options for responding: ‘Did you not think of that possibility?’; ‘Do you get on well?’

Repeated use of closed questions can take the discussion along a downward spiral of awkward communication with the client saying less and less and you becoming pressured to ask more and more questions.

There are times when closed questions are useful as a questioning summary: ‘So, overall, you are saying you were pleased with that session?’

### Elaboration questions

These may or may not be open questions, and are used to encourage the person to elaborate on what has already been said: ‘Can you give me an example?’; ‘Can you say a little more about that?’

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### Leading questions

These suggest to the client that a particular answer is expected, and that there are particular beliefs or values that should be held: ‘Do you really think that …?’ ‘Shouldn’t you be considering …?’

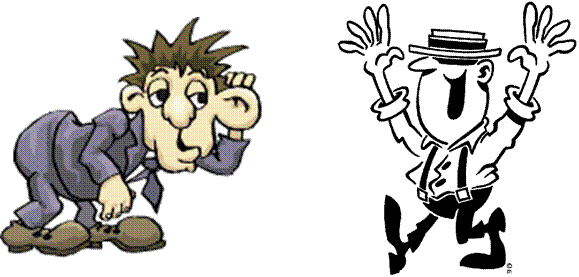
### Multiple questions

Several different questions are asked in one sentence leading to potential confusion for both the client and yourself: ‘Is it that you feel … or that you think it would be better if … or perhaps that she should …?’

Usually, you would not use a mixture of the above questions when finding out what the client’s needs are.

### Then, of course, you have to

* LISTEN to the client’s answer,
* Pay attention to the client’s body language for any hidden messages and
* Use problem solving techniques to get to the bottom of the problem.



## Use Technical Language Appropriately

By using the skills discussed previously you now know the emotional state of the client as well as what the main points of his query is.

It is now important to communicate on his level. If the client uses technical language you need to know what he is talking about and reply using technical language.

On the other hand a client that is not well informed about different technicalities will not grasp technical terms and ideas. When communicating with this client you will have once again adapt yourself to his level of thinking and it will probably be necessary to explain certain concepts in your own words in order to assist him in understanding what you are trying to communicate to him.

Likewise it is necessary for you to grasp what he is verbalising in his own words.

## Use Variation In Tone, Pitch, Volume And Pace

Now that you know what it means to vary the tone, pitch, volume and pace of the way you speak, you can use these methods to:

* Enhance the meaning of what you are saying to the client
* Respond appropriately to the client, even in differing circumstances

You will vary these methods according to the circumstances under which the client is talking to you:

* If the client is in a hurry, you will speak faster – enhance the pace – in order to make the client see that you realise that he is in a hurry.
* If the client is hard of hearing, you will talk louder of course
* If the client is angry, you will speak at a lower pitch and a deeper tone in order to calm the client down

In this way, you will vary the way you talk to the client according to the circumstances.

## Identify Barriers To Effective Communication

Many barriers to effective communication exist and can be detrimental to effective communication. Following are a few that have bearing on what is dealt with in this unit standard.

### Poor interpersonal skills

Like poor listening or insensitivity to nonverbal communication.

We have discussed listening skills and nonverbal communication at length. When you deal with clients, you have no excuse for not listening to what the client is saying or listening to non-verbal communication. It is part of your job and you have to do it. When a client is discussing something with you, the client is entitled to your undivided attention.

Always remember: you cannot listen while you are talking. In order for you to listen, you have to keep quiet and pay attention.

### Failure to identify the needs of the receiver

This happens when you listen to only part of what the client is saying and then start jumping to conclusions instead of listening to the client until he has stopped talking.

Only then can you come to conclusions, which you have to check with the client anyway, by repeating the issue as you understand it to the client.

“Am I correct in understanding that you want ….. done” or “As I understand, the problem is …..”

### Different cultural backgrounds

Clients will not always take differences in cultural backgrounds into account, but you have to. You are not allowed to judge a client or anyone else you are talking to because their cultural background is different to yours.

When you are communicating with someone who is not a client, you can explain your cultural background, if you wish, as long as you do it in a nice way.

When you are dealing with a client, it is part of your job and your duty to take that person’s cultural background into consideration. If you don’t know much about that person’s cultural beliefs, you have to make an effort to find out what they are. This will make future communication with the client easier.

### Lack of intercultural understanding

This is a major problem in our country today. Unfortunately, when you are dealing with clients, you have to ensure that you do not suffer from a lack of intercultural understanding.

### Messages with too much/little information

Many people find it difficult to express themselves clearly when they are under stress. They will usually either give you too much or too little information.

You have to be aware of this, so that you can:

* Focus on the important and relevant issues when a client gives too much information
* Ensure that you get all the relevant information when a client gives too little information

“I was mugged, they hit me over the head, there was blood all over the place, I had to go to the hospital to get stitches and my handbag was stolen.” This is an example of too much information. You have to find out what the problem is that the client wants to address.

“My handbag was stolen.” This is too little information and you have to find out what the issue is that the client wants resolved.

### Irritating mannerisms

Irritating mannerisms can prevent people from listening.

When a person is tapping on the desk or tapping a pencil against his teeth the whole time that you or he is talking, or when someone shakes his knee or twitches his shoulder all the time.

Some people say “You know…” a lot, others say “ah…” all the time while talking. There are many more examples of irritating mannerisms that you should not adopt while talking to a client. When a client has these mannerisms, however, you have to ensure that they do not distract you from listening to the client.

### Use of insensitive or abusive language

This is never acceptable, but can happen when a client is angry or irritated and perceives that his problem is not going to be addressed properly.

The best way to handle this is to calm the client down without saying anything about his insensitive or abusive language.

You will find in most instances that the client will apologise as soon as he can see that his problem is going to be addressed in a way that is satisfactory to him. The next time this client is angry and has to deal with you, he will usually not be abusive.

You must always be aware of how you talk to other people in order to ensure that you do not use insensitive or abusive language, as many people stop listening when you talk to them in a way that they don’t like.

When dealing with a client you must be able to identify these barriers and overcome these barriers by using the skills that you have developed. You must also ensure that you do not erect barriers to communication by one of the above actions.

## Clarify Appropriate Information

As we have seen, some people use jargon and slang during communication. When this happens it is important to clarify this information by expressing it in plain language and ensuring that you know exactly what is meant thereby.

It is also important that you check with the client that the client understands what you are saying.

## Check The Client’s Understanding

An open-ended question asks for more than a simple “yes” or “no” answer and forces the recipient to elaborate on his answer.

These questions normally begin with “who”, “what”, “where”, “when”, “which” or “how”. Use such questions to ensure that the client understands what you are communicating.

## Describe Relevant Options

Once the problem has been identified and understood by both parties it is time to formulate and agree upon a workable plan of action to resolve the matter at hand.

Suggest a range of possible relevant options to achieve this. You can also ask the client for his/her opinion on how to solve the problem. This lets the client feel that he/she is part of the process and will usually help to calm the client down.

The options that you suggest should always be in line with company policy. Many companies have specific ways in which specific situations are handled and any suggestions you make must always be in line with this.

HiFi corporation, for example, do not give cash refunds. They have what is called a carry in warranty, meaning that the client takes the faulty product back to them and they will then have the product replaced or repaired. You cannot then tell the client that he will get his money back, because it’s not going to happen and will irritate the client even more.

## Reach Consensus On The Most Viable Option

When the options have been discussed and understood you and the client must agree on which option is the best in the circumstances.

Once you and the client have agreed on the best course of action, you then have to agree to an action plan on how the issue will be resolved. Included in the action plan should be the following:

* Date of the discussion with the client
* Sate the problem/s or issue
* State the action plan: who will do what
* Follow up dates: when will follow up be done.
* Follow up procedures: what will the procedure for following up be: will you phone or write the client, when will the client do this or that, when will your organisation do this or that.
* Who is in your organisation will be responsible for the follow up
* And any other relevant information

## Outline The Proper Procedure To Be Followed

After reaching consensus on which plan of action to follow this plan of action must be outlined and discussed with the customer step by step.

The plan must outline all the responsibilities of both parties as well as deadlines when different steps need to be completed.

If necessary, a letter or e-mail should be sent to the client as confirmation of the discussion.

## Record The Details

It is good practice to make rough notes of the main ideas during communication. This will enable you to recall these main points at a later stage.

Rough notes will usually take the form of a summary and you do this while talking to the client.

Always also ensure that you check your summary with the client. You can say something like: “Can I make sure that this is the problem you want resolved…” and then you quote the problem/s from your notes.

### Types of summaries:

* Paraphrasing: when you rewrite something using your own words.
* You can summarise in point form
* When you are summarising a big piece of text, you will make use of headings and sub-headings. This manual is an example of using headings and sub-headings to break a big piece of text into smaller pieces
* Another method of summarising is using a mind-map.

## Record File Notes

From your rough notes you should record a detailed and accurate version of what was said and decided for future reference, giving all the relevant details. This can be done manually or by using your word processor.

This would normally be in the form of an internal memo, which would include all the details of the communication with the client:

* Date
* Problem/s
* Action plan
* Follow up dates
* Follow up procedures
* Who is responsible for the follow up
* Feedback to and from the client
* And any other relevant information

The record of the transaction can also be in the form of a report or even a form designed by the company for the purposes. The procedure will depend on the organisation you work for.

What is important is that you are the first contact with the client, so it remains your problem: you have to ensure that

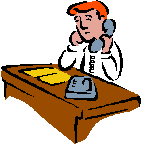
* The action plan is followed,
* That the dates are diarised,
* That the follow up procedures are followed correctly
* That the responsible people actually do what is required of them
* And that feedback is given to the client.

## Process Of Communicating With The Customer

1. Greet the customer according to the procedures of the organisation
2. Determine the needs of the customer: follow the steps detailed in this learner guide
3. Check the requirements with the customer: follow steps detailed in this learner guide
4. Confirm the course of action with the customer: follow steps detailed in this learner guide
5. Close the conversation on a positive note

### Greet the customer

Normally there is a company policy in place to instruct employees in the standard procedures of receiving visitors or clients.

Here are a couple of things that you should keep in mind when greeting a visitor who is entering the premises:

* It is very important to make eye contact with the person entering, so that they know you are aware of their presence. Even if you are busy on the phone, you should get up and acknowledge the person entering or at least give a signal along with eye contact.
* This is not the expression you should have!
* The second thing to do would be to greet the client, in a **friendly** and **well-conducted** manner.

It is not a good idea to ask the person or client entering how they are doing on first contact. The person is most probably there for information on the organisation or to do business with the organization, not to have a friendly conversation on a personal level with a receptionist.

The greeting could go something like this:

**{You}**: Good day Sir/Madam, welcome to …. How may I assist you?

**{Client}:** Good day, I would like to place an order

**{You}:** Certainly, what do you need?

{Client}: places order.

**{You}:** Take down the order as the client places it

**{You}:** Let me see if I have noted everything you need. (Repeat the order, quoting prices and delivery dates)

**{Client}:** Yes, that seems to be everything

**{You}:** Good, I will arrange for delivery on …The number I can contact you if there is a problem will be number you gave me?

**{Client}:**  Yes, that is correct.

**{You}:** Is there anything else I could help you with?

**{Client}:** No, that will be all thank you.

**{You}:**  Thank you for your valued support Mr. …Have a lovely day (or what the procedure in your organisation is)

ALWAYS CLOSE A CONVERSATION ON A POSITIVE NOTE

This is the memory the customer takes away with him/her.

* While you are having a conversation with the client, it is very important to pay attention to your demeanour, meaning your outward behaviour or bearing. As I mentioned before, eye contact is very important! Always look at the client or visitor when talking to him or her.

**Always smile and be friendly, even if the client isn’t, or if you are in a bad mood. It is not the organisation’s problem, neither is it the clients!**

* If you treat visitors or clients in this manner, you can never go wrong. It is professional and the way it should be done in every organization.
* Now, not all clients are going to be as friendly as the one in the dialogue above. You will at times come across difficult (as I like to call them) clients.
* The most important thing to always keep in mind when dealing with such a visitor is to stay calm! Don’t be rude to the client, no matter what he or she says or does. It will not always be easy, but you have to try. Unfortunately you don’t know what kind of a day the client has had when he/she arrives at your organisation. They could have been in a car accident or had their car stolen for all you know and it is therefore part of your job to either make that client’s day better, or not to make it worse. If you are rude to a difficult client, the organization might lose potential business and you will be the one that ends up at the short end, because you will be in trouble with your superiors for being rude to a client.
* If, and only if the client is unhappy about something that happened between the client and your organization, it is part of your job to try and find out what the problem is and if there is anything you can do to help resolve the problem. It is important to do so in a calm way. Speak to the client in a calm tone of voice, even if he is rude. Don’t push too hard to find out what is wrong. If the client wishes to speak to someone in a higher position, try and get them to the relevant person as soon as possible. It is important not to agitate a visitor like this even more.
* If the problem is not between the client and the organisation it is best left alone.