

General Principles, applicable to all scenarios

- Be assertive NOT aggressive – there is a very big difference. Never ever get angry at frontline staff; they are doing a job and they are not paid to put up with you being rude or nasty to them.
- Make sure you are talking to the right person. At best, you will have to repeat yourself, at worst you are wasting your time – and theirs.
- Once you are speaking to the right person, check that they are ready, prepared and have the time to have the conversation (even if you don't go into detail straight away)
- Be clear about what you are trying to say
- Be concise – lots of words are not necessary
- Be direct. Get the point and keep to it.
- Deal with one thing at a time; don't go in with a "laundry list" of demands or needs.
- Allow space and time for responses; do not interrupt and don't put words into their mouth
- LISTEN to what is said in return; use "active listening" techniques – nodding, repeating – to make the person speaking know that you are paying attention.
- Arm yourself with facts. Stick to them and don't let emotion get in the way of a result
- Use closed questions to check understanding – "Do you feel better today?"
- Use open questions when asking about feelings or concerns "How do you feel today?"
- Don't invalidate or deny them their right to get upset at the subject being discussed
- Summarise what has been said at the end
- Write down decisions made and agreements reached
- Focus on achieving your intended outcome; stop when you have, and either finish the conversation or move on to the next point
- Don't force the issue if they don't want to talk about or make a decision right away
- Think about what objections might come back at you and how to deal with them
- Never ever belittle a concern expressed to you
- Show empathy with their situation and any decision
- Don't get angry if you don't get the outcome you want. It's better to leave the conversation and try again another time.
- Speak calmly and keep a balanced tone throughout - even if they lose their temper. Never, ever shout. If you do, you have failed.
- No means no. It might not be the answer you want, but sometimes you have to accept that.
- You may only get part of what you ask for, or a compromise. Think beforehand about what is the minimum that you can accept as a good result.
- Always, always, express your thanks, for being listened to, for having your points considered, for getting a result. It will make it easier the next time.