



# Unit 5

## Communication Skills

### Learning Outcomes

**By the end of this unit the learner will be able to:**

- ✓ Improve your communications skills, including listening, questioning, and being more assertive.

## Unit 5

### Communication Skills

We will be talking about communicating through writing and non-verbal communication a bit later, but with all forms of communication, understanding is the key. Worry less about whether or not others understand you, and worry more about your ability to understand other people.

What are some of the barriers we face?

- Ñ **The speaker's words.** If the speaker is hurried, uses complicated words, or speaks with an accent, they can be interpreted negatively.
- Ñ **The speaker's expression.** Looking stern, distracted, or disdainful can have a negative impression.
- Ñ **Tone of voice.** A sharp, loud, angry sounding voice can be interpreted negatively.
- Ñ **Body language.** Hands on hips, drumming fingers, or rolling eyes can be interpreted negatively.

Other barriers can include:

- Ñ Noise
- Ñ Distance
- Ñ Hearing difficulties
- Ñ Distractions
- Ñ Inattention
- Ñ Disinterest
- Ñ Emotions
- Ñ Experience
- Ñ Vocabulary
- Ñ Culture
- Ñ Educational level
- Ñ Moods

### Asking and Listening

#### Asking Questions

The two most powerful communication skills we have, other than our non-verbal skills, are our abilities to listen and to ask questions. These are the tools we use to overcome our communication barriers, and this may surprise you, but most of us don't do either of them very well.

First, let's look at asking questions. There are two main types of questions: closed and open.

### **Closed Questions**

Closed questions are those that can be answered by either "yes" or "no," or with a specific bit of data, such as your name, date of birth, occupation, etc. These questions restrict our responses and give us little opportunity to develop our thoughts. As a result, they require little effort and can even close down a conversation.

Closed questions tend to be over-used, partially because they require very little effort on the questioner's part as well. They are easy to phrase and we get quick answers. Unfortunately, such questions also can lead us to assume, and assumptions can be big barriers to good communication.

### **Open Questions**

Open questions, on the other hand, encourage people to talk. These questions are phrased so they cannot be answered with a simple "yes" or "no." Open questions often begin with a variation of the five W's, (who, what, when, where, why), or can ask how.

### **Examples**

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Open questions are used to:

- Ñ Get information
- Ñ Focus conversations
- Ñ Solicit opinions
- Ñ Gain consensus

The unintentional use of a closed question can often be overcome by following it with a simple open question. For example:

- Ñ "Do you feel that was the right thing to do?"
- Ñ "Yes, I do."
- Ñ "Can you help me understand why you feel that way?"

## Clarifying Questions

Remember the saying from Stephen Covey's book, *The 7 Habits of Highly Effective People*: "Seek first to understand, then to be understood." You will want to gather information from others in order to understand them better. Most of us are better at presenting our own point of view than we are at drawing out information from others.

Here are some useful clarifying questions:

- Ñ What do you think we can do about this?
- Ñ What would you like me to stop doing?
- Ñ Would it be helpful if I...?
- Ñ Supposing we were to...?
- Ñ Can you help me understand where you're coming from?
- Ñ Can we set a time to discuss the changes we're both prepared to make?
- Ñ I'm prepared to... Would that ease the situation?

## Active Listening

Active listening means that we try to understand things from the speaker's point of view. It includes letting the speaker know we are listening and that we have understood what was said. This is not the same as **hearing**, which is a physical process, where sound enters the eardrum and messages are passed to the brain. Active listening can be described as an attitude that leads to listening for shared understanding.

When we make a decision to listen for total meaning, we listen for the content of what is being said, as well as the attitude behind what is being said (is the speaker happy, angry, excited, or sad?).

## Responding to Feelings

The content (the words spoken) is one thing, but the way people feel really gives full value to the message. Responding to the speaker's feelings adds an extra dimension to listening. Are they disgusted and angry, or in love and excited? Perhaps they are ambivalent! These are all feelings you can reply to in your part of the conversation.

## Reading Cues

Really listening means that we are also very conscious of the non-verbal aspects of the conversation.

- Ñ What are the speaker's facial expressions, hand gestures, and posture telling us?
- Ñ Is their voice loud or shaky?
- Ñ Are they stressing certain points?
- Ñ Are they mumbling or having difficulty finding the words they want to say?

### Demonstration Cues

When you are listening to someone, these techniques will show a speaker that you are paying attention, providing you are being sincere.

**Physical indicators** include making eye contact, nodding your head from time to time, and leaning into the conversation.

You can also give **verbal cues** or use phrases such as "Uh-huh," "Go on," "Really!" and "Then what?" You can use **questions** for clarification or **summarizing statements**. Examples:

- Ñ "Do you mean they were charging \$4.00 for just a cup of coffee?"
- Ñ "So after you got a cab, got to the store, and found the right sales clerk, what happened then?"

### Tips for Becoming a Better Listener

- Ñ **Make a decision to listen.** Close your mind to clutter and noise, and look at the person speaking with you. Give them your undivided attention.
- Ñ **Don't interrupt** people. Make it a habit to let them finish what they are saying. Respect that they have thoughts they are processing and speaking about, and wait to ask questions. Make comments when they have finished.
- Ñ Keep your **eyes** focused on the speaker and your **ears** tuned to their voice. Don't let your eyes wander around the room, just in case your attention does too.
- Ñ Carry a **notebook** or start a conversation file on your computer. Write down all the discussions that you have in a day. Capture the subject, who spoke more (were you listening or doing a lot of the talking?), what you learned in the discussion, as well as the who, what, when, where, why, and how aspects of it. Once you have conducted this exercise 8-10 times, you will be able to see what level your listening skills are currently at.
- Ñ While keeping in mind not to interrupt people, ask a few **questions** throughout the conversation when it's polite to do so. When you ask, people will know that you are listening to them, and that you are interested in what they have to say. Your ability to summarize and paraphrase will also demonstrate that you heard them.
- Ñ When you demonstrate good listening skills, they tend to be **infectious**. If you want people to communicate well at work, you have to set a high example.

## Non-Verbal Messages

Non-verbal messages are, in fact, more important than the words we say. This can include the way we stand, what we do with our hands, the sound of our voice, the way we walk, and the expressions on our face.

Not that long ago, studies told us we only had four minutes to make a first impression. Today, we only have 90 seconds. In this fast-paced society, we don't have time to get more than a quick snapshot of how a person looks before we make up our mind about them. They are making up their mind about us at the same time, too.

### Body Language

Much of our face-to-face communication happens through body language. While we deliver a message through words, we are also emphasizing, confirming, or even negating what we say through our tone of voice and our non-verbal body language.

The face and the eyes are the most expressive means of body communication. Additional positive or negative messages are sent by your gestures, posture, and the space between you and the other person.

Body language must be in tune with your words and tone, or you will send a mixed and often confusing message. Positive body language is important to supporting your words and ensuring complete understanding.

### The Signals People Send

The chart below can be used as a guide to help you with some of the signals that people send.

Non-Verbal Communication	Interpretation
<b>Facial Expressions</b>	
Frown	Displeasure, unhappiness
Smile	Friendliness, happiness
Raised eyebrows	Disbelief, amazement
Narrowed eyes	Anger
Blushing	Embarrassment
<b>Eye Contact</b>	
Glancing	Lack of interest
Steady	Active listening, interest, seduction
<b>Hand/Arm Gestures</b>	

Pointing finger	Authority, displeasure, lecturing
Folded arms	Not open to change, preparing to speak
Arms at side	Open to suggestions, relaxed
Hands uplifted outward	Disbelief, puzzlement, uncertainty
<b>Body Postures</b>	
Fidgeting, doodling	Boredom
Hands on hips	Anger, defensiveness
Shrugging shoulders	Indifference
Squared stance or shoulders	Problem-solving, concern, listening
Biting lip, shifting, jingling money	Nervousness
Sitting on edge of chair	Listening, great concern
Slouching in chair	Boredom, lack of interest
<b>Clothing</b>	
Business dress	Authoritative, conservative
Sloppy attire	Disrespect, lack of responsibility
Casual clothes	Relaxation
<b>Proxemics (Physical Space)</b>	
From physical contact to 18 inches	Intimate space
From 18 inches to 4 feet	Personal space
From 4 feet to 8 feet	Social space
From 8 feet outward	Public space
<b>Voice Characteristics</b>	
Speaking loudly, quickly, and with clipped enunciation	Anger
Monotone and downward inflection	Boredom
High pitch, fast rate, loud volume, and upward inflection	Joy
<b>Status Symbols</b>	
Rare or expensive possessions	High status
Prestigious titles	High status

## Writing Skills

### The Four C's

Writing should be:

- Ñ **Clear**, so the reader can understand what is being said.
- Ñ **Concise**, without additional, unnecessary words.
- Ñ **Complete**, with all the information the reader needs to know.
- Ñ **Correct**, without spelling errors, typos, or grammatical errors.

### Be clear.

- Ñ If a one-syllable word will do the job, use it.
- Ñ Stay away from jargon or words of the trade the reader might not understand.
- Ñ Don't be pretentious.
- Ñ Make your writing easy to read.

### Be concise.

- Ñ Eliminate unnecessary words. Don't use long, wordy phrases when a single word will do. For example, write, "now," rather than, "at this point in time."
- Ñ Avoid vague words like "better" or "faster." How much better? How much faster?
- Ñ Don't create long, complex sentences by stringing phrases and clauses together carelessly.

### Be complete.

- Ñ Answer the questions: Who? What? Where? When? Why? How?
- Ñ Make a checklist of all the important points you want to cover. Check them off when the piece is done.
- Ñ Empathize with the reader. Ask yourself, "Have I told them everything they need to know?"

### Be correct.

- Ñ We make most of our mechanical mistakes in four areas: grammar, punctuation, usage, and spelling.
- Ñ None of us need to be walking dictionaries, punctuation guides, or spelling champions. Learn the most common errors, how to avoid them, and where to go for help when you need it.
- Ñ Most grammatical problems concern agreement and misplaced modifiers. Subject and verbs should agree in number. If the subject (noun or pronoun) is singular, the verb should be singular, too: e.g., "he is walking" is correct; "he are walking" is not, because "are" requires a plural subject ("we").

## Punctuation Pointers

### Commas

The comma (,) sets off or separates words or groups of words within sentences. Commas are the **most common punctuation mark** inside a sentence. However, the trend today is to use them only when absolutely necessary, or when omitting the comma would cause confusion.

Use a comma after a **long introductory phrase or clause**: "After working all day at the office, I went home for dinner." If the introductory material is short, forget the comma: "After work I went home for dinner."

Use a comma **if the sentence would be confusing without it**, as in: "The day before, I borrowed my boss's calculator."

Use a comma to **separate elements in a series**, including numbers in a list: "I enjoy drinking orange juice, tea, milk, and coffee." You also use it with **numbers**: "5, 7, and 9." (There are some style guides that omit the comma before "and," but you'll notice that we like it. The important thing is to make sure that you are being consistent, and that you use what your organization is using.)

Use a comma to separate **independent clauses that are joined** by and, but, or, nor, for, or yet. "We shopped for three hours, but we didn't make a single purchase."

Use commas to **set off nonessential elements in a sentence**. Compare these two sentences:

- Ñ In this sentence: "At the podium stood a man wearing a green suit," the phrase "wearing a green suit" is essential to identify which man.
- Ñ However, in this sentence: "At the podium stood Frank, wearing a green suit," the phrase "wearing a green suit," adds nonessential information about Frank.

### You can also use a comma to:

- Ñ Separate a city or town from a state or province, as in Sarasota, Florida and Ferntree Gully, Victoria.
- Ñ Set off the name in a direct address, as in, "Jane, can I please see you in my office?"
- Ñ After dates, when day, month, and year are used, as in, "He was born Thursday, August 12th, 1975."
- Ñ Before degrees that come after a name, as in Joan Walker, PhD.
- Ñ Set off an informal quotation, as in: Robert remarked, "My investment counselor is very good."
- Ñ After linking adverbs such as however, therefore, etc. "The hike was several miles long; however, the path was a good one."

Separate thousands in numbers for clarification, as in 18,239.

**NOTE:** Not all countries use commas and periods in the same way or for numbers over a thousand or decimals. Make sure you know your audience!

### When shouldn't we use commas?

- Ñ Do not use commas between two independent sentences.
- Ñ Do not use commas after titles like Jr. or Sr.
- Ñ Do not use a comma after a month when only the month and the year are used.

Note: If you use words like however, moreover, therefore, consequently, nevertheless, or then between two independent clauses (i.e., sentences by themselves), you must use one of the following:

- Ñ A period
- Ñ A semicolon
- Ñ A comma plus a conjunction between the two clauses

### NOT, "It looked difficult, therefore, we did not try."

- Ñ BUT, "It looked difficult. Therefore, we did not try."
- Ñ OR, "It looked difficult; therefore, we did not try."
- Ñ OR, "It looked difficult, and therefore we did not try."

### Semicolons

A semicolon (;) separates two independent clauses, but it keeps those two thoughts more tightly linked than a period can: "I type letters; he types bills."

The semi-colon sometimes raises people's blood pressure, but it is a very useful punctuation mark. A semi-colon has **three important features**:

- Ñ It is considered a more defined pause than the pause required by a comma.
- Ñ It is used to separate major sentence elements of equal grammatical rank.
- Ñ It is used to separate sentences joined by logical conjunctions such as however, therefore, thus, and nevertheless.

**Example:** "I learned all the rules and regulations; however, I never really learned to control the ball."

It can also be used to **separate two closely related sentences not joined by a conjunction**. The semi-colon in this instance is useful for showing contrast or balance.

**Example:** “Having more work to do is relatively easy to bear; what stings is having more to do than everyone else.”

It should also be used to **separate a series** that is complicated or whose items containing internal punctuation (such as commas).

**Example:** “Please direct your comments to one of these individuals: Pat Warner, chair of the committee; Ross Ingram, public affairs; or Calvin Jenkins, promotions.”

Use a semicolon before and a comma after the following words if the words come between two

**independent clauses:**

Ñ Accordingly	Ñ Likewise	Ñ Otherwise
Ñ Also	Ñ Indeed	Ñ Similarly
Ñ Besides	Ñ Instead	Ñ Still
Ñ Consequently	Ñ Moreover	Ñ Then
Ñ Furthermore	Ñ Namely	Ñ Therefore
Ñ Hence	Ñ Nevertheless	Ñ Thus
Ñ However	Ñ Nonetheless	

**Examples:**

- Ñ “I thought I had completed the project; consequently, I was surprised to hear about the additional work.”
- Ñ “We have prepared your estimate; however, you should sign it by Friday.”
- Ñ “The partner’s retreat will be held in March; therefore, all business matters will be discussed then.”

**Colons**

A colon (:) is a tip-off to **get ready for what’s next**: a list, a long quotation, or an explanation. It’s used to separate independent clauses when the second clause explains or amplifies the first.

- Ñ “Fred was proud of his sister: she had been promoted to managing partner.”
- Ñ “My new office contains the following items: a partner’s desk, a leather chair, and oak paneling.”
- Ñ “We need additional information: escrow statements, tax returns, approved bank loans, and mortgage agreements.”
- Ñ “There are two things to remember in a job interview: always arrive promptly, and always dress appropriately.”

Other common uses include:

- Ñ After the formal salutation in a business letter
- Ñ Before a list
- Ñ To separate hours and minutes (depends on culture)

## Apostrophes

An **apostrophe** (') is commonly used to form the possessive of nouns and some pronouns and to mark the omission of letter(s) in a contraction.

**Use an apostrophe when the meaning of "it's" is "it is."** (Using it's when the word does not mean "it is" is one of the most common mistakes in the English language!)

Note that it's never correct to use an apostrophe in a possessive version of its. This means that anytime you see "its" with an apostrophe after the s, it is incorrect.



Use an apostrophe to show **singular possession** ("The doctor's office was always busy") and **plural possession** ("The doctors' offices were always busy").

**Note:** The use of an apostrophe can be determined by inserting an of phrase, as in "The offices of the doctors were busy."

If the noun is **singular**, add "s":

- Ñ "I enjoyed Betty's presentation."
- Ñ "Someone's coat is in the lobby."

The same applies for the singular nouns ending in "s" like James: "This is James's new office."

Use an apostrophe to show **possession of two objects by two people**. "Hilda's and Janet's cars were crushed by the falling tree."

Use only one apostrophe when a **possession is shared by two people**. "Robert and Susan's house sold in five hours."

Use an apostrophe to show **possession in words that are already plural**. "The women's changing room

at the gym was being renovated.” Or, “The men’s changing room had been renovated last year.”

Use an apostrophe to show **contractions**. “They’re on vacation and can’t get back in time for the meeting.”

Use an apostrophe to show **plural of lower case letters**. “I made sure that I dotted all my i’s and crossed all my t’s before I signed the contract.”

Use an apostrophe to show **possession in a single compound noun**. “We are living in my mother-in-law’s house until ours is finished.”

Use an apostrophe to form the **possessive case of indefinite pronouns**. “This election could be anyone’s win.”

Use an apostrophe in **expressions of time or value**: two weeks’ notice, two dollars’ worth of nuts.

## Spelling Tips and Tricks

Here are some tips for making your documents the best that they can be:

- Ñ Use a dictionary. It doesn’t matter which form you use, but it is important that you be consistent.
- Ñ Use spell check on your computer, but don’t rely on it totally since it often misses incorrect homonyms.
- Ñ Use the Internet or a telephone book to check spelling of names and addresses. However, there are sometimes errors in these sources, too. If you are not sure, simply call the office of the person you are contacting and ask.
- Ñ Proofread your work, and when possible, have someone else proofread your work.
- Ñ Learn some little tricks to help you remember words that you use frequently but still spell incorrectly, like “i before e, except after c.”
- Ñ Make a list of your most common spelling errors and learn how to spell those words correctly. Keep that list posted so you can refer to it when you need to.

## Proofreading

Proofreading carelessly can spoil a writer's best efforts. Proofreading is classic evidence that writing looks different to the writer and to the reader. Our brains really think that everything we do is correct, so we have a hard time recognizing our own errors.

To the writer, typographical or spelling errors may not mean all that much. So your finger slipped, or you always put two t's in "commitment." For the reader, an unfixed typo can transform the writer from a smart person into a careless writer in the twinkling of an eye.

It is impossible to read about "fist class work" or "shot meetings" without interrupting the flow of what you are reading. It may be unfair that proofreading matters so much, but it does.

If you can put yourself in the reader's position, you'll proofread obsessively, gripped by the fear that a mistake will turn you into a laughingstock! Learning some specific techniques, however, will help alleviate that problem as you become better at proofreading and create better documents.

Proofreading errors are different from punctuation or spelling or usage problems, and you fix them differently. Punctuation, spelling, and usage are knowledge problems, and you fix them by learning. Proofreading problems are usually a matter of seeing, and you fix them by learning to look. The better you read, the worse you'll proofread, unless you are consciously aware of what you are doing. Good readers and fast readers guess what the words are as they read the text, and they just check in now and again to see if they are right. The more they can guess, the less they have to look and the faster and more efficiently they read.

To be a good proofreader, you have to go back to being a child again, or pretend that you are just learning to read in English. Look at every word as it comes along.

## **Letters and Memos**

Here are some suggestions to make your letters and memos more professional and easier to write.

### **Use templates.**

If your supervisor gives you a letter, notice its components, wording, etc., and use that as a guide for the next letter you have to create. Most companies have templates with their letterhead already inserted so that their brand and message is consistent. As well, many word processing programs come with pre-made templates that you can customize.

Another good tip is to save letters that come to you, even junk mail letters, if their phrasing, closing, etc. work for you. Use appropriate parts when you are creating letters.

### **Keep memos short.**

Memos should only have one subject in them. They are used for internal documentation and are not intended to be sent outside of your organization.

### **Check and double-check your work.**

Don't rely on spell check to find all your mistakes. Try to have somebody else read your work, or at least set it aside for a while before reading it again so that you approach it with a fresh mind later.

Have a good reference nearby and use it to check those things you are unsure of.

## Getting Ahead

### What Employees Want

Just what exactly would make you satisfied with your job? Below is a list of things that managers believe are important:

- Ñ A better relationship with your manager
- Ñ Career development opportunities and training
- Ñ Greater clarity about what the organization needs you to do and why
- Ñ Greater clarity about your own work preferences and career goals
- Ñ Improved cooperation among your coworkers
- Ñ More challenging work
- Ñ More flexible job conditions
- Ñ More opportunities to do what you do best

**Take a moment and rate each of these items from 1 to 8, with 1 being the most important to your job satisfaction and 8 being the least important.**

Item	My Rating	My Partner's Rating
A better relationship with your manager		
Career development opportunities and training		
Greater clarity about what the organization needs you to do and why		
Greater clarity about your own work preferences and career goals		
Improved cooperation among your coworkers		
More challenging work		
More flexible job conditions		
More opportunities to do what you do best		

**Do you know what your supervisor wants from you?**

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**Do you know how your supervisor will measure your performance?**

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Here's how employees ranked these items in surveys conducted in 2011 by Blessing White, a global consulting company.

1. More opportunities to do what you do best
2. Career development opportunities and training
3. More flexible job conditions
4. Improved cooperation among your coworkers
5. More challenging work
6. Greater clarity about what the organization needs you to do and why
7. A better relationship with your manager
8. Greater clarity about your own work preferences and career goals

(Source: [http://www.blessingwhite.com/EEE\\_report.asp](http://www.blessingwhite.com/EEE_report.asp) or [http://www.blessingwhite.com/content/reports/BlessingWhite\\_2011\\_EE\\_Report.pdf](http://www.blessingwhite.com/content/reports/BlessingWhite_2011_EE_Report.pdf))

You may want to share your thoughts with your supervisor as well. Quite often they are surprised by what we value from the workplace.

On the other side of the coin, most employees don't know what their supervisor expects. If you don't know, ask and find out. It may be accurate work, a clean desk at the end of the day, or a pleasant attitude. If you are doing a lot of work and completing all your assignments, but leaving an untidy desk at the end of the day, and that clean desk is what your supervisor judges you by, you will be the loser.

### **What Others Want**

One essential way for you to be successful is to help other people get what they want.

If you find out what your supervisor considers valuable, and then make sure you give it to them and help them become successful, you will be more successful, too. Read any self-improvement book and you will

learn that hard work, focused goals, and persistence are important, very important, in getting where you want to go in life. But so is helping other people achieve their success. Without them, you won't achieve yours.

Do you think there is anything else that is important in achieving your goals and enjoying your work life? Attitude!

Once you know what your supervisor wants and expects of you, you will be more productive because you know what your priorities are. You cannot only do things right, but you can also do the right things. This may mean giving up a couple of your own priorities for those of your supervisor, but that's okay. At least you have a common understanding of what the priority is. However, don't give up all of your priorities in favor of your supervisor's. Just make sure that their priorities are covered first.

Don't count on your job description to tell you what your priorities are. Job description duties are often a low payoff with little results. Get the basic duties done, but focus on the high-payoff actions, the activities that will help you and your boss be successful and help you develop and grow.

## Self-Management

### Self-Management

How would you respond to somebody who says:

- Ñ If it weren't for the traffic, I'd get to work on time.
- Ñ If it weren't for Hilda interrupting me, I'd get my work done.
- Ñ If it weren't for my boss changing their mind all the time, I'd know what I was doing.
- Ñ If it weren't for my \_\_\_\_\_, I'd be a happier person.
- Ñ If my children would pick up after themselves, I could keep the house clean.

Remember this old saying: **If it's to be it's up to me.**

There are some very straightforward things you can do in order to be successful. Routines are a good example of this. **Routines** simplify and create order, which is essential if you are in a state of chaos and high stress. When you introduce routine, you have energy left over to be wildly creative.

Top performers in every area of industry have lives that are well balanced by routine. Most of us have routines we follow in the morning. Think about your morning routine and how, if you skip it, you have a tougher time launching your day or can have forgotten something important (like leaving your lunch behind in the fridge!).





- Ñ Sorting and filing papers

## Setting up a Daily System

Now that we have a clear, functional working area, let's set up a daily system. We need something that will:

- Ñ Remind us when a task is due
- Ñ Save us from hunting for documents when we need them
- Ñ Allow us to focus on daily tasks and not worry about things slipping through the cracks

## Priority Tray

The first element to this system is the priority tray. This should be a shallow tray in a corner of your work area. It will contain whatever you are currently working on at the moment, plus any emergency items.

Typically, you will work on one item at a time. If someone rushes in with something that must be done right away, you can place your current project in the priority box, switch to the emergency task, and then go back to your project right away.

**The priority tray must be empty at the beginning and end of every day.** Don't let it become a black hole!

## The Incubator

Also known as a pending file system or a tickler file, the incubator will keep all documents that require follow-up in one place. This file should be placed within easy reach but out of sight. A good place might be the top of a filing cabinet, or, if space is short, on a windowsill.

Here is what you will need:

- Ñ A hanging file holder
- Ñ 12 hanging folders
- Ñ 31 manila folders
- Ñ Felt-tip marker and a pen

First, **label the hanging folders** with each month in the year. Arrange them chronologically with the current month in front. Then, **label the manila folders** from 1 to 31. Put the folders for today until the end of the month in this month's folder. Put the remainder of the folders in next month's folder.

So, if today is March 12, my incubator will look like this:

- Ñ March 12
  - 13
  - 14
  - 15

- 16
- Through to 31
- Ñ April
  - 1
  - 2
  - Through to 12

Now, **file any items** according to when you need to access it in order to complete it on time. So:

- Ñ A brochure that you need to review for a conference in June would be placed in the June folder.
- Ñ An invoice that needs to be paid by March 15 would be placed in the March 1 folder.
- Ñ A ticket for a concert on April 12 would be placed in the April 12 folder.

**At the beginning of each day**, take the folder for that day. Review its contents. Handle anything that you can right away, and place remaining items in your priority tray. Place the date folder in the next month. **At the end of the day**, if there is anything left in your priority tray, re-file it in the incubator. **When the month ends**, check the main folder for the next month and file any stray items by date.

If you don't have a lot of follow-up tasks, one hanging file folder might do the trick. However, we strongly recommend the incubator system. Try it for 30 days!

### Being Proactive

One day a doctor realized she kept having a long line of patients waiting to see her—a line extending far out of her office and into the street. She already knew what was wrong with each patient. Each patient had a sprained ankle from stepping into the deep hole in the sidewalk out in front of the office. The doctor knew the source of her own dilemma. She was just too busy seeing patients in pain with sprained ankles. She never could take time to get someone in to repair the sidewalk.

**What was the doctor's problem?**

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**What would you suggest she do?**

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Ultimately, of course, the doctor’s real problem was her lack of planning. We can’t just keep reacting. We have to be proactive.

If we don’t plan, nothing is likely to change for the better, and we are likely to be stressed out. Then we just keep making the same mistakes over and over, without looking for solutions and planning our strategy.

### What are some guidelines to keep in mind when we think about planning?

- Ñ Once a plan has been made, schedule it.
- Ñ Know how much you can realistically accomplish in a day.
- Ñ Schedule your most difficult tasks for high-energy times of day.
- Ñ Check your to-do list three times a day to see if you are on schedule.
- Ñ Reward yourself when you accomplish a significant activity.
- Ñ Don’t book 100% of your time. Leave a reserve for emergencies.
- Ñ If you have to travel across town to get to a meeting, make sure you schedule in travel time so that you can get there on time.

We plan, we put plans in place, we check to see if they worked, and if they don’t work, we adjust or take further action. Tasks need to be done, and planning alone won’t do it. Acting without planning will be less productive. Taking time to check to see whether we have done the right things will prevent us from having to learn from our mistakes.

## Setting Goals

### Setting Goals with

### SPIRIT The SPIRIT

#### Acronym

Most of us can’t hit a target if we don’t know where to look for it. Likewise, you have a better chance of reaching your goals if you follow some guidelines when you are making them. Peak performers write their goals down, look at them regularly, and make adjustments as needed. When you think of the things that you really want in life, write them down so that they have SPIRIT.

#### Specific

Be specific about what you want or don’t want to achieve. The result should be tangible and measurable. “Look gorgeous” is pretty ambiguous; “Lose 20 pounds” is specific.

**Prizes**

Reward yourself at different points in the goal, particularly if it's long-term. If your goal is to set up a home office, for example, you might purchase a new desk when the room is cleared out and ready.

**Individual**

The goal must be something that you want to do. If your spouse wants you to lose 20 pounds but you think you look fine, you're not going to want to work towards the goal.

**Review**

Review your progress periodically. Does the goal make sense? Are you stuck? Do you need to adjust certain parts of it?

**Inspiring**

Frame the goal positively. Make it fun to accomplish. You could make a poster of the end result, frame it, and post it on the wall.

**Time-Bound**

Give yourself a deadline for achieving the goal. Even better, split the goal into small parts and give yourself a deadline for each item.

**A Personal Action Plan**

You know, most of us settle for much less than we can be. Don't settle for that. It takes work to make changes, but we can change — we just have to want that change badly enough to take action!

Many of us are full of ideas but short on taking real action to put those ideas into play. Maybe we try something once and then meet failure because we didn't think and plan the actions through. But you know what they say about the lottery: "You can't win if you don't buy a ticket." The same is true in life: "If you stop trying, you lose all chance of succeeding." Make a covenant with yourself saying that you will make an effort to put what you learn today into practice, especially when techniques will benefit you.

### Further Reading:

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