Introduction

Effective face to face communication is a vital element in personal and organisational success. A few well chosen words can make the difference between a message which is rejected or misconstrued and one which is clearly understood and achieves its purpose. Similarly, the time and place chosen for the delivery of a message, the approach taken or the tone of voice used, can have a powerful impact on the response it elicits. This checklist provides pointers to the main factors affecting interpersonal communication in a range of organisational contexts and gives practical guidance on making your communications as effective as possible. In this age of modern remote communication and social networking, it is worth noting that attitudes to face-to-face communication are changing. Bear this in mind if you need to communicate effectively with younger staff.

Definition

Face to face communication is a process of personal interaction during which messages – including ideas, opinions, information, feedback, instructions, feelings and so on, are passed from one person to another. Within the organisation face to face communication takes place in many different contexts for many different reasons. It may be upwards, with your own boss or other senior staff; downwards, with junior staff who report to you or to other managers; or sideways, with colleagues. Externally, face to face communications cover a range of encounters, from those with suppliers, clients or customers, to those with colleagues from similar organisations or competitors. Effective communication means that the messages have been correctly received and understood and will be acted on appropriately.

Action checklist

1. Clarify the purpose of the communication and its expected outcome

Think about what you expect to achieve from the encounter. Distinguish between your long term goal (for example to ensure that a major project is delivered on time and within budget) and what you expect to achieve from this particular meeting. This will provide a benchmark against which to judge whether the communication was effective. Practitioners in the field of Neuro Linguistic Programming, which examines how thoughts and feelings learn to respond to language, use an effective set of questions before a communication:

- What do I want to happen as a result of this interaction?
- How will I know whether this is starting going to happen? What will I:
2. **Choose the time and place**

Choose a time when the person you need to speak to will be able to give you their full attention. Don't raise an important matter which needs consideration at a time when the other person is under pressure to meet a deadline or is expected at a meeting elsewhere. Consider the most appropriate setting for the meeting, the level of privacy required and the facilities you might need. If you are fixing a time and place in advance, make sure that both parties are happy with the arrangements. Be realistic and set a time limit within which you can reasonably expect to achieve your planned outcome. With open-ended communications, such as counselling interviews, discuss the timing with the interviewee first.

3. **Prepare yourself**

Decide how much of the communication you can plan in advance. Do this where the outcome is known and critical, and needs to be unambiguous. This includes, for example, key contract meetings with clients or suppliers, disciplinary interviews with junior staff or critical progress meetings with senior staff. Only take an unstructured approach where the purpose of the communication is to seek information or to counsel. In some cases, you may need to gather relevant information or put appropriate documentation together.

4. **Consider your use of space**

Respect the personal space of those with whom you are communicating and think about the physical distance which will be appropriate to the context - too close and you will be intimidating; too far away and you could be threatening. If you need to compete, negotiate or argue, you may wish to adopt an assertive stance, positioning yourself directly opposite the other person, but if you are seeking cooperation and collaboration you may want to place yourself side by side with them. Think too about the layout of the room where the encounter or meeting is taking place and decide whether a formal or an informal setting will be more conducive to success. However, be wary of using your desk as an artificial barrier to reinforce your status.

5. **Ensure you are in the right role to achieve the outcome you want**

Assume the role you need to secure your outcome, such as tutor, adviser, boss or salesperson. Do this consciously and don’t slip into another role during the meeting or allow yourself to be led into one. Ensure you select an appropriate role: don’t attempt to discipline someone if you have assumed the role of friendly adviser. Only change roles if the outcome you are seeking changes during the meeting.

6. **Create rapport before you begin**

Do what you can to establish rapport before launching into your pitch. Smile and enquire how the respondent is feeling. Ask questions that will encourage the flow of conversation before addressing the topic of concern. Be aware that people may be inhibited even if they appear at ease, especially if you are in a senior position. Try to establish that you are someone they can do business with.

7. **Adopt the right tone**

Use a tone that is appropriate to the role you need to play without appearing artificial. If you are seeking information, be relaxed, open and warm; if you are conducting a disciplinary interview be firm and business-like. Be wary of using the wrong tone or style or you will send a confusing message to the listener.

8. **Set the scene**

Begin by providing background to the issue to be discussed and summarising previous meetings or conversations. Ask for an update or new information and avoid second-guessing what the other person will say. Present your own case openly and don’t be devious or clever. Aim to focus the minds of both sides on the factual issues before progressing to remedial action or a solution to a problem.
9. **Be aware of attitudes, values and expectations**

Be aware of the other person's viewpoint and take into account what you already know about their behaviour and approach, especially if you are aware of the results of any psychometric assessments undertaken. Ask yourself how they may view the issue and what barriers will this throw up to prevent you achieving the outcome you desire. You can use this knowledge to plan and steer the interaction. For example: a person whom you know to be factual, withdrawn and driven by detail is unlikely to be comfortable or motivated to act if you present your words in an overly extrovert and passionate style. Consider their values and show respect at all times, but be wary of introducing prejudice by assuming that all employees in a certain category will view an issue the same way.

10. **Understand and manage the pressures both parties are under**

Be aware of any possible concerns the other person might bring to the encounter that could block progress - about their competence to do a job, their own career prospects, what colleagues might think, or whether they might be asked to rush a job and compromise on quality, for example. Recognise and face up to the pressures on yourself - the need to act fairly, legal requirements, deadlines and time pressures.

11. **Use the right skills to achieve the outcome you want**

Strike the right balance between asking open questions to elicit information, particularly at the beginning of the interview, and more specific questions to tie down details. Listen carefully to what the other person says. Be aware of their body language and non-verbal signals; and use these to check that your questions are being understood and correctly interpreted. Use signals and gestures, to reinforce your message and convey shades of attitude and expression.

12. **Bring the encounter to a close**

Actively steer the encounter toward a conclusion. Use closed questions to check your understanding and assumptions. Identify the main points the other person has made and use their words to summarise the key conclusions.

13. **Stop once you have achieved the desired outcome**

If you have set a clear objective for the meeting and achieved it, then stop. Don't dilute the impact of what you have said by straying on to another agenda or reviewing the content of the meeting. Being tightly focused on the outcome of a communication will gain you time and effectiveness.

**Managers should avoid:**

- trying to address an important issue at a casual encounter when time is short
- setting an over-ambitious agenda for a face to face meeting - you will confuse the other person and finish without achieving any of your objectives
- adopting the wrong role or style for an encounter or allowing yourself to be led into one that is inappropriate.

**National Occupational Standards for Management and Leadership**

This checklist has relevance to the following standards:
D: Working with people, units 1, 2

**Additional resources**

**Books**

*Just listen: discover the secret of getting through to absolutely anyone*, Mark Goulston
New York: AMACOM, 2010
The communication problem solver: simple tools and techniques for busy managers, Nannette Rundle Carroll
New York: AMACOM, 2010

Successful workplace communication, Phil Baguley
London: Hodder Education, 2009

The nonverbal advantage: secrets and science of body language at work, Carol Kinsey Goman
San Francisco: Berrett-Koehler, 2008

Body language, Geoff Ribbens and Greg Whitear

The jelly effect: how to make your communication stick, Andy Bounds
Chichester: Capstone, 2007

This is a selection of books available for loan to members from CMI’s library at: www.managers.org.uk/library

Related checklists

Ensuring clear communication (200)
Conducting a performance appraisal (036)
Undertaking a disciplinary interview (109)
Steps in successful selection interviewing (107)

Internet resource

MindTools: www.mindtools.com
Section on communication skills includes an introduction to communication skills and articles on topics such as active listening and negotiation.

This is one of many checklists available to all CMI members. For more information please contact

t: 01536 204222    e: enquiries@managers.org.uk    w: www.managers.org.uk

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