

VitalSmarts White Paper

# Get the Word Out

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## How the Crucial Conversations Mastery Course Helps Individuals, Teams, and Organizations Get the Results They Want

*The average employee is likely to have spent more time memorizing the capitals of Europe than learning how to deal with hostile customers, insensitive coworkers, or unreliable suppliers.*

*Here are skills that make a difference.*

The problems that plague organizations are nearly always rooted in the same cause: perplexed employees who aren't quite sure how to bring up touchy, controversial, and complex issues—and resolve them.

For example, an employee notices a coworker violating a quality or cost-cutting procedure. Could he say something? Should he? A skilled professional catches wind that a boss is putting pressure on a colleague to circumvent the safety system. Should she speak up? After all, this is the boss. Gulp. A front-line supervisor notices that one of her direct reports isn't dealing with a diversity challenge in a way that is consistent with the corporate vision. Should she intervene? Or should she leave it to HR?

Significant corporate issues can only be resolved when employees are fully able and genuinely willing to step up to their friends, coworkers, direct reports, customers, vendors, and bosses alike—and talk frankly and effectively. In short, they must be masters of crucial conversations. Nothing else will do.

## The Challenge

Why does the ability to speak boldly and honestly play such an enormous role in corporate problem solving? Because no matter the robustness of company policies, no matter the array of carefully crafted support systems, no matter the eloquent speeches outlining a company's vision, they all fail because people fail to hold one another accountable—to follow the policies, make use of the systems, and live up to the vision.

Crucial conversations are a corporation's moments of truth. These are the times that expose a company's true character. And every time one of these moments emerges, the opportunity to make a difference and create the right result lies in the hands of every-day employees who may

1. Walk away from it,
2. Awkwardly rush in and increase the damage, or
3. Step up to and professionally solve the problem.

Of course, employees should professionally solve the problem, but they don't always. The challenge to professionally solve problems in real-time lurks beneath every nagging corporate problem.

## The Promise

### The Solution Is at Hand

Let's start with the good news. The ability to step up to and solve problems—no matter how touchy, awkward, or challenging—can be learned. Strange as it may sound, most people haven't spent very much time enhancing their influence skills. In fact, the average employee is likely to have spent more time memorizing the capitals of Europe than learning how to deal with hostile customers, insensitive coworkers, or unreliable suppliers.

This imbalance can be quickly corrected. In our bestselling book, *Crucial Conversations: Tools for Talking When Stakes are High*, we introduce our discovery that skills for rapidly improving nagging corporate problems can be learned. Through the book, free Web resources, reading group discussions, and formal training programs, people begin to realize that by enhancing their influence skills they can improve everything. They can improve their ability to address an abusive coworker or their capacity to deal with a teenager who isn't honoring curfew. Once people willingly and eagerly start to hone their skills, they begin to understand their behaviors. Once they understand their behaviors, they begin to discuss issues that had previously been "undiscussable." With time, they learn to calmly discuss topics that traditionally had been swept aside or had exploded out of control.

### No One Person Or Position Has To Carry The Burden

Problems spring from all parts and levels of every organization. Solutions should come from the same sources. Problems solved at the earliest and lowest points in organizations cost the least, while those that fester and grow until they are felt across an entire organization are the most expensive to resolve. Crucial Conversations skills can be taught to the entire workforce so that everyone can shoulder the problem-solving load. Leaders who practice these skills and then equip employees to do the same don't have to carry the burden alone.

## One Set of Skills Serves a Host of Challenges

The ability to speak up and be heard and encourage others to do the same can be leveraged to solve everything from safety and diversity issues to quality and cost control to customer issues. While it's true that these dissimilar topics call for very different policies and procedures, the skills required to implement them are the same. Teach people how to master crucial conversations, and you're ready for anything.

## Results Will Improve

Crucial Conversations skills are aimed at the problems you care about. These skills are not just about communicating more effectively under tough conditions, they teach individuals how to step up to and solve the issues behind your hottest problems.

Crucial Conversations training is not about training. It's not about communications. It's not even about morale, safety, quality, cost, or productivity. It's about solving *any and all problems* that keep you from the results you want. You identify the result. You focus the effort. You achieve what you want.

## Crucial Conversations Training

The Crucial Conversations Mastery Course provides a training environment where participants learn how to spot problems early, notice the process of the conversation, and avoid common problems associated with the alternatives to dialogue—silence or violence.

## What Participants Will Learn

### 1. How to Stay Focused on What They Really Want

When stakes are high and opinions vary, most people become emotional. As a natural consequence, their higher-level brain functions shut down and they soon become narrowly focused—usually on the wrong target. Instead of wanting to do what's right, their goals change (often unconsciously) to wanting to win, save face, or make others look bad. Participants learn how to remain focused (even under pressure) on the goal of staying in healthy dialogue. *Remaining focused on what you want out of an interaction helps you achieve the results that really matter.*

### 2. Where They Themselves are Most Capable and Vulnerable

Nothing helps us get to where we want to go better than a map. Of course, if we want to use a map effectively, we have to know where we currently are. Participants will learn how they routinely act during crucial conversations (their Style Under Stress). Armed with the knowledge of where they currently are, they'll know where to focus their time and attention in order to get where they want to be. *Self-awareness opens the door to self-improvement.*

### 3. How to Notice When Safety is at Risk

The enemy to honest and respectful conversation is fear. Fear stems from the belief that bad things are about to happen. If we believe that speaking openly will cause us problems, we tend to move to silence—withdrawing our ideas. If we think our best ideas are about to be trampled and rejected, we

tend to move to violence—trying to force our point of view on others. Participants will learn to pay special attention to the signs that either they or others are feeling unsafe. Knowing that dialogue is at risk alerts observers that it's time to bring their best skills into play. *Constant vigilance surfaces problems early and keeps damages to a minimum.*

#### **4. How to Make It Safe to Talk About Almost Anything**

Knowing that we or others are feeling unsafe isn't enough. We have to be able to restore safety if we ever expect to return to healthy dialogue. Participants master the skills that make it safe to talk about almost anything—by learning how to make their honest and pure intent known to others. It is not the *content* of what we say that strikes fear in others (despite the fact that it may be sensitive, controversial, or even negative), it's the perceived *intent* that makes them nervous. Knowing how to communicate intent, establish mutual purpose, and clarify possible misunderstandings empowers participants with the ability to step up to the most challenging of conversations. *With the right intent, you can talk about any content.*

#### **5. How to Be Persuasive, Not Abrasive**

The more we care about an idea, the more likely we are to push our personal agenda with such force that others openly resist us out of a sense of natural preservation. Like it or not, the more significant the issue, the more likely we are to be on our worst behavior. To help combat their natural tendency to advocate too forcefully when it matters the most, participants learn how to eliminate resistance by starting with facts, using tentative language, and inviting others to share their views. *Softening your stance strengthens your credibility.*

#### **6. How to Stay in Dialogue When They are Angry, Scared, or Hurt**

Participants will learn how to take charge of their own emotions. Instead of seeing others do something they dislike, jumping to the worst conclusion, becoming angry, and then suffering the consequences of acting on that anger—participants learn a different approach. In place of telling Victim, Villain, and Helpless stories that feed their emotions, participants learn how to withhold negative judgment, take charge of the stories they tell, and regain control over their feelings. Cutting off knee-jerk responses at their emotional roots puts participants in a far better place to respond with healthy dialogue rather than spout nasty accusations or pious pronouncements. *Take charge of your stories before your stories take charge of you.*

#### **7. How to Listen When Others Clam Up or Blow Up**

When others either run for cover or weigh in with an ugly attack, it can be particularly hard to stay in healthy dialogue. Left to our natural proclivities, when others attack we respond in kind. Thousands of years of genetic engineering can do that to you. On the other hand, when others move to silence, we either miss the point altogether or try to pry people out into the open with a crowbar. Participants will develop skills for helping both assailants and escapees step back from their ugly conclusions and retrace their cognitive path to the original facts and observations. *Stripped of unhealthy conclusions and immersed in facts, emotions dissipate and the conversation turns to healthy problem solving.*

## 8. How to Move From Thought to Action

Just when we think we're through with a complicated and delicate conversation, a whole new set of problems emerges. We've surfaced the facts, discussed them in a healthy way, and now it's time to take action. This too requires skill. When the finishing stage of a healthy conversation is handled poorly, people are left feeling confused, betrayed, and unfulfilled. Participants will learn how to clarify what form of decision making they'll apply to a solution (not everything is done by consensus) as well as how to clarify who will do what by when and then hold others accountable. *While it's true that we need to begin a crucial conversation with the end in mind, we need to end a crucial conversation with action in mind.*

## 9. How to Be Masters of Dialogue

The overall goal of crucial conversations training is to teach dialogue skills. Every single element of the training serves but one purpose—the free flow of meaning. And for good reason. Effectiveness (personal, team, and organizational) is directly proportional to the accuracy and completeness of the ideas that eventually fuel individual human action. Garbage in, stupid behaviors out. On the other hand, as people speak honestly, clearly, and factually, the pool of shared meaning expands. Then people act not on personal whims or fractionated facts, but on the best ideas available. And they do so out of a commitment born of genuine involvement. *Learn how to jointly expand the pool of meaning and enjoy the benefits of enlightened choice.*

## 10. How to Achieve the Results They Want

Crucial Conversations skills are *not* taught in a vacuum. Participants apply each skill to the problems they face every day. The training teaches ideas, enhances skills, propels people to apply them to real problems, rewards participants for stepping up to new challenges, and eventually helps organizations achieve much-needed improvements. With a vast majority of the companies that implement Crucial Conversations training, the training isn't selected as an educational offering, but is chosen to fuel the engine of a much larger change project. Whether your burning issues are bloated costs, cultural diversity challenges, fleeing customers, quality losses—or all of the above—Crucial Conversations skills will help you get back on track.

## How Participants Will Learn

Each session of the Crucial Conversations training is divided into the following six segments.

- **Problem.** Every Crucial Conversation training session starts with the problem that it's designed to solve. Nobody wants to be pulled away from their busy schedule unless it's obvious that the lost time will be more than compensated for by learning how to solve important problems. Start where people live—with their problems.
- **Solution.** Once participants understand the problem they're about to address, they immediately move to the solution. With Crucial Conversations training, this vital step always involves a blend of vision (why), strategy (what), and tactic (how). If participants don't have an intellectual appreciation for the goals they're trying to achieve, the principles

that guide their behavior, and the social scripts that breathe life into the principles, they're not ready to move on. Once they know all three, they're ready to practice.

- **Practice.** It's now time for the training participants to open their mouths and speak. Of course, when they do, the devil is in the detail. During this stage of the training, participants talk and receive detailed feedback on everything from their exact wording to their tone of voice and nonverbal behaviors. Participants break off into pairs and, within a protected environment, practice what they've studied. They start with safe issues and then move to genuine, at-risk conversations. Although this exercise can sound threatening, it's always done in a safe way.
- **Application.** As participants move from knowing to behaving, they have one more important gap to bridge. They have to move from talking more effectively in the classroom to talking more effectively in life. To help with this difficult transition, participants engage in a variety of activities that help them identify how the skills they've just learned apply to their typical day. For example, where might they use the skill? How might they see the "entry condition" or clue that it's time to try out the skill? What problems should the skills immediately help resolve?
- **Commitment.** For years scholars have studied maintenance. What does it take to maintain new skills or stay with better habits—despite an onslaught of detractors? The data from this research is both unequivocal and startling. If training participants don't integrate the skills they've learned into their daily action—almost immediately and frequently—the decay curve exacts an ugly toll. That's why Crucial Conversations trainees make commitments to practice their new skills back at work, within a day or two. Participants aren't simply requested to "try something." They develop specific, measurable plans and then go out and complete them.
- **Report.** At the beginning of each training session, participants discuss what they actually did during the previous week to fulfill their commitments. This step puts teeth in the training. It adds an element often left out of training—accountability. Since accountability discussions lie at the very heart of Crucial Conversations training, accountability is built into every training session.

## Teaching Methodology

### Vision, Strategy, and Tactics

#### Vision (Why)

For the greater part of the twentieth century individuals who attended leadership and influence training were fed a constant diet of theories that were, at best, severely imbalanced. Up until the mid 1980s, few if any influence scholars studied everyday people in action. Consequently, the advice they proffered suffered on two fronts. First, influence theory was generally written to leaders and then only to CEOs of major corporations—limiting the audience to less than one percent of the world.

Second, the focus of their efforts was on vision and vision alone. Scholars sat around and imagined what it was that high-profile senior executives needed to think about. Here's the kind of advice that was commonly offered:

*The job of a leader is to decide what to do and then  
to find ways to get others to want to do it.*

Notice the qualities of this homily. It makes sense—reminding people that you can't force others to want to do anything. It's pithy and memorable. It's a bit counter-intuitive. And it attacks a common problem.

Also notice that it suggests what leaders should *achieve*, not what they should *do*. For most people, this type of advice falls far short of what they need. They already know a great deal more about what they're supposed to be getting done than they know about how to do it. The point here is not to say that vision has no role in the leadership literature or influence training. It's actually the best place to begin—with the end in mind. It's also the wrong place to finish. People need more. They need a blend of vision and practical advice.

### **Strategy (What)**

If you want people to learn how to adopt new behaviors, provide them with a broad sense of what they're supposed to be doing. Once you've shared your vision (achieve this), quickly move to behavior. Move from *achieve* this to *do* this. But don't get too detailed. Start with a general sense of what training participants should do. Talk strategy. For example: "In order to get people to want to do something, always speak out of mutual respect." This strategic advice (typically offered as a general principle) moves attention away from overall achievement and places the focus on personal action.

### **Tactic (How)**

Armed with a clear vision and a general sense of principles, it's time to become practical by turning tactical. It's time for detail. At this point in any training program the content should focus on skills that are both recognizable and replicable. People should know exactly what you're talking about and (with very little instruction) should be able to enact the requisite behaviors. Example: "When you first bring up a problem, describe what was expected versus what was observed." Most people know exactly what this means and could actually do it.

### **The Perfect Blend**

What's interesting about these three training targets is that any one of them by itself is insufficient to bring about change. Vision without tactics feels imbalanced and vacuous. Tactics without vision often appear simplistic and unworthy of attention. Tactics without strategy are generally less memorable and compelling. Combined, the three form a perfect blend of motivating goals, memorable ideas, and practical actions. In short, effective training turns vision into strategy, strategy into tactics, and eventually, tactics into daily habit.

## How the Training is Delivered

Since Crucial Conversations training explores the intricacies of human interaction, at the heart of the instructional design you'll find brief and poignant video examples that demonstrate the do's and don'ts of how to handle high-stakes conversations. Video examples clearly display the skills required to deal with everything from harassment to shirking responsibility to making unrealistic demands. These video models, coupled with engaging exercises, relevant practices, and high-spirited discussions make the training both stimulating and relevant. The overall design combines high-tech tools with high-touch exercises in a way that transforms training into an unforgettable experience.

Here are some of the basic characteristics of the training.

- **Varying lengths.** The Mastery Course takes two days to complete, but can be delivered either back-to-back or in once-a-week sessions across several weeks. Train it in lengths that serve your needs.
- **Easy to train.** Since the training materials are meticulously and completely designed, almost anyone can learn to train the lessons in only a few hours. Professional trainers and front-line supervisors alike routinely deliver the training.
- **One size fits all.** The presenters' materials provide instructional layering—serving the differing needs of each trainer. Click a button and an exercise is introduced. If you need a reminder, click another button and the instructions appear. The same is true for questions and answers. If you can't remember a summary question, click a button. Want to see the answers? Click another button. Trainers love the design for its sparseness, leaders love for its completeness.
- **Easy navigation.** Since the presentation materials (slides and video), are all digitally rendered, you can easily navigate to wherever you want in the training—skipping an element, returning to a video, and reviewing previous concepts by merely clicking a button. No more rewinding or sorting through slides.

## Training Materials

**Presentation**—This CD-ROM tool combines slides and video clips into a smart looking, highly interactive, video-rich, easily managed presentation. The CD-ROM offers multiple levels of support for variations in the presentation depending on your experience as a trainer and the knowledge of your audience. It includes over 120 embedded video clips that demonstrate the Crucial Conversations principles and skills. Your laptop, LCD projector, and speakers are all you need to deliver the course.

**Leader's Guide**—The Leader's Guide takes you step-by-step through each screen, giving you pacing guidelines and teaching tips, and an immediate connection to the Participant's Toolkit.

**Participant Toolkit**—This kit provides a participant manual filled with detailed summaries of principles and skills and plenty of room for writing down thoughts. The kit also contains model cards

and cue card reminders to improve retention and application, as well as a copy of the book *Crucial Conversations: Tools for Talking When Stakes are High*.

## How the Training Content is Tailored

### Self-Tailoring

The existing training design requires people to create their own goals and objectives. Participants select what they themselves want from the training and then develop a plan to get there. In a very real sense, Crucial Conversations training is always tailored—by the participants themselves.

When the training is completed in-house, the material is always delivered before a backdrop of existing organizational needs. Every exercise and discussion is framed to fit existing organizational circumstances. As participants learn the material, their natural reaction is to ask: “But what about us?” From there the conversation flows freely. Equally important, the link between the Crucial Conversations skills and an organization’s existing challenges is so readily apparent that trainees move with ease from abstract ideas to tailoring the skills to fit their unique culture and problems.

### Tailoring the Practices

If you’d like, a VitalSmarts design specialist can take the existing practice materials and rewrite them to fit your specific needs. Since the behavioral practices are part of the digital delivery system (the situations are projected to the screen), the tailoring can be done quickly and efficiently. If safety is your hot button, safety will be the focus. The same can be said for quality, productivity, harassment or any other topic that you want to spotlight. You pick the exact problems you want to solve. We’ll take it from there.

### Tailoring the Video

With large training interventions (those that affect hundreds, even thousands of people), it often makes sense to tailor the video examples themselves. While it’s true that our existing video library addresses most companies’ issues, if you’d like to ensure that your concerns are reflected in the video, we’ll tailor it as well. Ask us about this option and you’ll be surprised at how rapidly and economically we can partner with you to produce videos that deal with the problems you care about the most.

## How the Delivery Can be Tailored

Since the training is digitally delivered and organized into modules, it can be rolled-out in dozens of different ways.

- **Who Trains?** You train it, or outside experts train it. If you train it, you can use either training specialists or leaders.
- **Who Gets Trained?** The material is as relevant to senior executives as it is to the newest and most junior employee. You don’t have to reshape the material to fit different audiences

because everyone faces crucial conversations. The skills and language are always the same. All that changes across levels and departments is the nature of the problems themselves. So, train whoever you want. Pick the people who need it the most and get started right away.

- **Where?** Conduct the training on or off site.
- **How Often?** Train the material as an intensive learning experience over two days or, to optimize the learning design, spread the content across multiple sessions separated by a week to ten days.
- **Mediated or Self-Paced?** The current training design calls for trainers to deliver the material. But partner with us and we'll create a more stand-alone design that suits your remote locations. We'll host the cognitive part of the training over the internet—allowing people to move at their own pace. Then, once individuals have passed the intellectual portion of the training, they meet in small groups and take care of the social components. They jointly discuss what they have learned and how it applies to their work, practice the skills, give each other feedback, commit to take action, and report back to each other. Enjoy the best of both worlds. Take advantage of the flexibility of self-paced learning as well as the motivating forces of a social intervention.

## Conclusion

When faced with high stakes and emotional discussions, many of us either step up to the challenge and fail (we're typically on our worst behavior) or we avoid the discussion altogether. Crucial Conversations skills teach what it takes to master these situations and achieve improved results in everything from productivity to quality. to personal relationships.