

PRACTICAL INTERVIEWING

INTERVIEWING IS A COMMUNICATION PROCESS

Second Edition



By

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Basic Points

While each interview situation will be different because of its purpose and the individual concerned, the following general points apply to each.

This series of articles covering interviews will explore:

- Problems and how to overcome them
- Approach, preparation and structure
- Questioning techniques
- Maintaining control
- Note taking
- How to find out what we need to know
- The importance of clear job descriptions and specifications.

Role of Interviewing

An interview is a structured interaction conducted for a specific purpose and focused on defined content. Interviewing can provide a means for gathering general or specific details, data, ideas, concepts, feedback, concerns, or history. The format of an interview depends on the nature, purpose and goal, the time constraints, styles of the participants – interviewer and interviewee. Yet all of the interview types share common characteristics and elements which can yield positive information exchange and which will produce constructive results.

Each of these interviewing categories requires different approaches and techniques for them to be effective. In addition, each category is part of the communication landscape that requires planning, practice, and polished performance. This book will provide an overview and checklist for each interview category.

First, consider the definition of communication:

The transference of ideas, facts and feelings between two or more people in order to achieve an understanding between them.

Conversation:

It is a natural form of communication between people.

The interview is a bit different:

The interview is a conversation which has a purpose and is directed towards

its object by the interviewer. The interview is a face-to-face meeting and discussion between two or more people for a specific purpose.

The four essential ingredients are:

- 1) Communication
- 2) Between 2 or more parties
- 3) One of which is in control
- 4) With a purpose

These four ingredients are common to all interviewing categories.

Initial Contact

Any first interview between two or more people contains potential difficulties. One such problem area is the effect of *first impressions*. The initial assumptions, perceptions, and inferences made by both you and the interviewee are often inaccurate yet lasting. It is difficult for an individual to discard preconceived or immediately framed impressions and then allow either of you to receive more information before making a decision or passing judgment.

One of the most effective means of managing this issue is to discuss the accuracy of initial impressions with the individual under consideration and to allow enough time for the absorption of information beyond that received in the first few minutes of contact. The impact of *expectations* must also be taken into consideration. Unrealistic expectations on the part of you or the interviewee most often lead to disappointment and frustration. Destructive expectations can be avoided if both parties state clearly their agendas and needs.

The final major area of potential difficulty is that of establishing some degree of *trust* between the participants in the interview. The interviewer's power to make decisions cannot be ignored. However, if you show sensitivity in setting the pace and tone of the interview and in establishing an open and honest dialogue between yourself and the interviewee, you can do much toward laying a foundation of mutual trust that will be valuable both during and following the interview.

Preparing for the Interview

Thorough preparation will allow you to conduct a well-structured, smooth-flowing interview that will yield the maximum amount of useful information in the shortest amount of time. The more you know at the outset of the interview, the more useful information can be increased. Before contact with the interviewee(s), you should obtain and review all relevant information. You should formulate some plan, whether formal or informal, for conducting the interview. Very often the plan may involve nothing more than a rough outline or a short list of key questions to be addressed. Generally, it is best for you to keep any written outline or plan immediately available as long as you are not distracted by referring to your outline.

One of the most neglected areas of interview preparation concerns an awareness of self. Are you tired? Are there personal issues that may interfere with the interview? Are there external stress factors, unrelated to the person(s) to be interviewed that may affect the outcome of the interview? Are there specific or general hidden agendas that may interfere in an unbiased interaction? You are not a machine that can be turned on and off just because a specific meeting has been scheduled.

Numerous variables can affect your listening accuracy, attention span, tolerance, responsiveness, and clarity of presentation. If distractions are present, I suggest that the interviewee be informed. You model appropriate, responsible behavior. You should remove possible barriers to an effective exchange. If you are experiencing too much anxiety to conduct the interview competently, it is advised that he reschedule the meeting.

Preparation

- Gather facts: all interviewing requires the interviewer to gather facts prior to the interview. Whether it is analyzing the job specification and knowledge, skills and abilities before a selection interview or investigating and fact-finding before an employee complaint.
- Ensure privacy and no interruptions: pick a place where you will have privacy and make sure you are not interrupted. If you are constantly interrupted you will lose momentum and communicate that the interviewee is not important to you.
- Allow adequate time: make sure in your planning you allow enough time for each interview. Some interviews will take longer than others; be clear about the purpose so you will be able to carve out enough time in your schedule.
- Plan your approach: do your homework, plan your method with your technique in mind, and make room for the unexpected. Develop a list of preplanned questions that will help you stay on track.

Barriers to Communication

Physical	The room - its size, warmth, comfort, untidiness. The layout of the furniture - large desk, small chair etc. Bad positioning of applicant - sun in eyes. Interruptions - secretary, telephone. Distractions - glass office, road works outside. Distracting mannerisms - biro chewing, foot tapping.
Speech Problems	Use of Jargon. Talking too much by interviewer. Foreign interviewee. Physical problems - stutter, deaf. Speaking down to interviewee. Talking above applicant's head. Not establishing rapport.
Other	Lack of understanding. Misunderstanding. Bias. Status. Lack of confidence.

Setting the Climate

A responsive interview does not just happen; it is created out of a specific design that lends itself to maximum benefits for you and the interviewee. The lighting, the placement of chairs, the use and type of background music, the organization of meeting space, and the degree of privacy all have a bearing upon the initial receptivity of the information being passed between participants. However, the most important consideration in establishing the proper climate is your attitude and the interviewee's. If both parties are willing to listen without bias, are open to the other person's perceptions, allow enough time to foster accurate understanding, and show a respect for each other's self-worth, then they themselves create a responsive environment.

Other factors can also assist in developing a comfortable climate. If you offer the interviewee a cup of coffee or a cold drink, this provides enough time to allow the

individual to become accustomed to the environment before the interview moves into substantive areas, discusses general issues in order to reduce any unnecessary anxiety, and states clearly the purpose of the meeting; this will add considerably to the development of an effective setting. Attention to the physical and emotional tone of the environment will generally pay off significantly for both you - in obtaining the information you pursue - and the interviewee, in feeling that he or she has been taken seriously and treated with respect.

Conducting the Interview

It is important for you to work into the body of the interview as smoothly as possible. You should look for a natural break in the general conversation. However, if a natural break does not appear, you should take the initiative in beginning a directed exchange. The difficulties most commonly encountered during the course of an interview are the result of poor questions and ineffective listening. A good question has a specific purpose. By asking the right questions and listening attentively, you can be assured of obtaining the information you need or of avoiding wasted time when the information is unavailable. It is important that you listen "between the lines" and, of course, observe interviewee's nonverbal behavior. In conducting an interview, seven key points should be kept in mind:

1. Avoid the use of questions that can be answered "yes" or "no".
2. Do not furnish answers to the questions.
3. If the interviewee hesitates, you can reword the question.
4. Avoid asking "loaded" or "leading" questions.
5. Be as natural as possible during the interview.
6. Avoid disagreeing with an interviewee's statement; disagreement signals that the "wrong thing" has been said.
7. Do not jump to conclusions; prejudging before the interview is over can hinder information gathering.

Effective interviewing does not depend merely on asking the "right" questions. If you are uncertain about what the interviewee has said, you can use three primary techniques to facilitate the communication process:

1. *Restating*, simply repeating exact words, is an effective method for you to indicate that you are listening attentively, and it encourages further elaboration on the part of the interviewee.
2. *Rephrasing*, summarizing the interviewee's statements, is an excellent method for ensuring that you understand what the respondent has intended.
3. *Reflecting*, using statements that mirror the interviewee's feelings, indicates that you are attempting to understand the other person's perspective, but does

not imply agreement.

Conduct

- Put interviewee at ease and establish rapport: interviewing is stressful enough. You will get better results by establishing rapport with the person you are interviewing. People feel comfortable talking about things they are familiar with. You might try the weather or as I did – the traffic and parking.
- Explain the purpose: take time to verbally outline what you will be focusing on during the interview and how you will conduct the interview.
- Encourage the interviewee: establishing rapport is the first step in encouraging the interviewee. Verbally explaining the structure and purpose of the interview gives you the opportunity to explain the person will be given ample time to present his or her back ground or his or her issues, etc.
- Do not ask leading questions or those which can be answered with yes or no: open ended questions are the best way to get the person talking. You sequence your questions by using a mixture of open and closed questions depending on the subject.
- Listen and observe: get the interviewee talking and listen to what he or she is saying as well as what is not being said. Observe body language and make eye contact with the person. Be respectful of cultural differences.
- Investigate areas which are not clear: if you encounter something that is not clear explore it further. You can ask the person, “help me understand...” or you can make a note and come back around to it later in the interview.
- Take notes: how can you make a decision if you don’t take notes? Practice taking notes without looking away from the interviewee. It will seem strange at first, but with some practice you will get the hang of it. Record verbatim answers to questions and use descriptions of behavior; avoid judgmental language.
- Check information before making a decision: review your notes and all of the available information before you make a decision.
- Judge impartially: avoid bias. We all have preferences and prejudices; filter yours and recognize how they might impact your final decision.
- Summarize at regular intervals; during the interview make sure you summarize periodically to secure understanding of the interviewee’s statements and presentation.
- Conclude on a positive note by stating what action if any will be taken and by when: if you have planned your interview you will know what will transpire after the end of the interview. To present yourself and your organization in the most positive light, tell the person what the next steps are and when to expect the event.

Contract Setting

Many interviews are conducted within one session. However, an initial interview often forms the beginning of what will be an ongoing working relationship. If there are more sessions, you have the responsibility for initiating a contractual agreement. This is a crucial juncture: it is a period when both parties must state their commitments to the ongoing process of contact and to the specific responsibilities required. Contract setting is often done with you explaining the conditions which need to be met, so that the interviewee can determine what her or his role will be and whether he or she can accomplish the task. Thus, job criteria, measurable outcomes, risks, etc., need to be clarified. If you are person's direct supervisor, you must communicate the amount of support that you can offer as well as how you will evaluate the individual's performance.

Concluding the Interview

Before concluding, you should make sure that the interviewee has had ample opportunity to ask questions and share perceptions. Then, when the entire interview has been completed, you should thank the interviewee, when appropriate, for his or her cooperation. If there is to be another meeting, you should be certain that the interviewee understands when and where the next interview will take place.

Your responsibility for closure involves your willingness to listen to the feelings, thoughts, and ideas of the interviewee. If the relationship has existed over an extended period of time, you may wish to begin discussing closure well in advance of the last scheduled meeting time. Key questions you might pose to the interviewee include: How do you feel about the loss of our relationship? What issues may arise in the future that you are concerned about facing alone or with another supervisee? What unfinished business can be taken care of before the end of our formal relationship? What does a change in structure mean to you? How can the benefits of our contact be continued without the structure we have developed? And, What unmet expectations can be achieved without the continuation of our relationship?

Last-minute complaints or problems will often surface, and they may reflect the interviewee's concern about terminating the relationship. Such concerns need to be addressed. If the relationship between you and interviewee has become closely bonded, then sadness, disappointment, or loss may be expressed. Your goal is to achieve closure with the knowledge that both you and the interviewee have done their best to carry on a beneficial exchange during your time together.

Follow up

Check that proposed action has been taken and that desired results have been

achieved, either by further interview or informal discussion.

Types of Interviews

While the sequence and the general guidelines generally hold true regardless of the nature and scope of the interview, specific types of interviews require additional strategies, techniques, and considerations.

The following format, used to compare and contrast the types of interviews explored in *Practical Interviewing*, provides an "at a glance" outline.

The headings used in the interview outlines focus on the following elements:

1. *Purpose of Interview* lists primary goals as well as the function of the interview type. This section also indicates the number of sessions generally required to complete the interview.
2. *Preparation* indicates specific information that the interviewer must possess in order to conduct the interview effectively. The section suggests key concepts, questions, and/or issues with which the interviewer needs to be familiar.
3. *Conduct* notes key points of information that will assist the interviewer in thoroughly assessing the interviewee's strengths, weaknesses, needs, etc. And *suggests* a general approach to conducting the interview. The methods used will generally have a significant impact upon the outcome of the exchange.

Skills of Interviewing

A good interviewer will control an interview without doing all the talking. He/She will use a variety of skills to draw out the information needed. The main 'tools' for achieving a successful interview are questions, statements, summaries, listening and observing.

Types of Questions

A good interviewer will alternate questions of different types. Most interviewers need to discover both facts and feelings - a combination of open and specific questions -although the balance may alter.

TYPE OF QUESTION	EXAMPLE	USAGE
OPEN (Cannot be answered yes or no)	'Why did you decide to join your local squash club' OR 'Tell me about your local squash club'	To get the interviewee talking about ideas and feelings as well as facts. A good question in a non- directive situation.
CLOSED (Should be answered yes or no)	'I understand from what you say that you don't like the squash club, am I right?'	To summarize. To bring back to the subject at hand if the conversation has wandered. To check if you have understood correctly.
SPECIFIC (Fact Finding)	'On what date did you join the local squash club?'	To find out the facts. A good directive approach. Good for the talkative interviewee.
REFLECTING (avoids bias; keeps talking)	'You aren't too happy with the squash club then?'	Reverses a statement of question by rephrasing and sending it back to the interviewee. Keeps the interviewee talking. Avoids personal involvement or bias showing. Encourages interviewee to expand the subject further.
LEADING (test reaction)	'I think it's disgraceful that the squash club is closed don't you?'	The answer is given in the question Dangerous if used inadvertently. Good for testing reaction, or relaxing a nervous person initially.
HYPOTHETICAL (obtains general views)	'If the squash club were to close what would you do?'	Good for selection -testing possible reaction to certain situations.

Statements

It is necessary for the interviewer to have the facts to be able to feed information into the interview for two reasons:

- To clarify misunderstandings
- To give information where it is needed to give understanding

Summaries

Interim

- To keep control of the interview
- To point out clearly how the interview has progressed

Final

- To give a positive finish. To make the final position clear
- To sum up what has been achieved during the interview
- To make sure the interviewee is clear about future action that was decided

Listening

Obvious but essential. The interviewer has to provide the "triggers" and listen and learn from the responses. It is not an opportunity for the interviewer to show off his/her knowledge or expertise. Concentrating throughout and analyzing what is said and not said and its significance:

- Picking up points for later expansion.
- Noticing discrepancies.
- Listening for generalization that may need to be questioned more specifically.

Being **seen** to be listening - an important part of establishing and maintaining rapport. Eye-contact is very important here -remember under 30 per cent there will be not enough contact -over 60 per cent becomes uncomfortable.

The Pregnant Pause - useful for probing. Don't afraid of silence; use it.

How Do You Show You Are Listening?

- Asking relevant questions
- Eye contact - 30 to 60%
- Body language
- Summaries
- Nodding
- Paralinguistics - Paralinguistics are vocalized indications of attention: e.g. grunts, "uh hmm", "uh huh", "oh yes", "really", etc.

- Aim for 80/20 – interviewee/interviewer talking

Hints to Good Listening

- Stop talking
- Listen for emotion as well as fact
- Put own issues aside
- Put talker at ease
- Look and act interested
- Remove distractions
- Try to put yourself in the talkers place
- Allow plenty of time
- Keep control of your temper
- Do not argue or criticize
- Ask questions to clarify points
- Listen for what is said as well as what is not said
- Ask searching but objective questions
- Reflect on meaning and summarize
- Stop talking!

Observing

Like listening. Important clues can be gained by watching expression and body language. These cannot be interpreted in a vacuum, but depend on the person and the situation.

General Interviewing Checklist

Objective

- What am I to achieve by the end of the interview?

Preparation

- What can I do before the interview?
- Mental
- Environment
- Material

Skills

- What can I do during the interview to stimulate communication and retain control?

Questioning Efficiency

- Listening and observing
- Making statement when necessary

- Using summaries
- Establishing and maintaining control

Follow Up

- Do I need to take action?
- If so - when?

Mental and Environment

Mental

- What is the objective?
- How long should it last?
- What do I know about the interviewee?
- What approach should I take?

Environment

- What sort of room? Is there a choice?
- How should we sit?
- Are there any distraction?
For example: sun in eyes, wobbly chairs, no table for coffee or water, noise, etc.
- Interesting view out of the window
- Interruptions
- Telephone
- People

Material and Conduct

- Material: What information do I need?
For example: Company policies, Reports; Personnel file, Applicant form, Relevant statistics, Names of specialists, Job description, etc.
- Establish rapport
- Explain purpose
- Encourage interviewee
- Be interested

The following will give you guidelines for each specific category of interview. Use these guidelines to formulate your interview process and integrate them into your own style.

Employment or Selection Interview

Purpose: To select the best available candidate to do the job and work for the company. That is, to determine if the applicant is right for the job and the organization and if the job and organization is right for the applicant.

To assess the strengths, weaknesses, and needs of the individual being interviewed in light of the specific requirement(s) of the position and the general needs of the organization. The employment interview is usually conducted in one session. To select from a number of qualified applicants that individual who is best suited for a position requiring significant responsibilities. The selection interview is generally conducted over a period of time and requires several separate interviewing sessions

Preparation

Requirements of the position. Precisely what will the individual who fills this position be required to do? What are the educational, work experience, technical background, and other requirements of this job?

Critical aspects of effective behavior. What specific behaviors will ensure successful entry to and maintenance of the position? What ineffective traits or characteristics would decrease the likelihood of success? Since the selection interview takes place with highly qualified individuals, the interviewer must detect often subtle differences among applicants. The interviewer should consider a rank ordering of ideal overt and covert traits before the interview takes place.

Organizational details. What is the salary range? What are the organizational policies and procedures relevant to the position under consideration? What benefits and restrictions are present for the new employee?

The first question you should ask your self is: Is the job really necessary?
It is always useful to go through the process of analyzing if the job is necessary; has it changed? Do we need to alter the job description to encompass these changes?
Why did the last person leave?

The implications if we get this wrong are obvious:- it can lead to aggravation and upset, waste of resources, waste of money and time; or, if we haven't made clear what the job entails, the person may get bored and won't stay.

The second questions we should ask: What is the job? We must be perfectly clear

about what the job needs is all about and what the performance standards are expected.

Draw up an interview plan - decide on the main areas of consideration; use an assessment system to compare candidates in these areas. Check all essential background information, write-up if necessary:

- Job description (written picture of the job) – see Job Description section below
- Person specification (written picture of the person able to do the job)
- Who will the person have to work with - large team, or small etc.
- Application form (look for clues, omissions, note further detail needed; questions).
- Internal file if applicant is an employee of the company
- Know the conditions of employment, salary etc.
- Allow adequate time, ensure privacy and if possible prevent interruptions
- Arrange reception and order tea/coffee

What a Job Description Does

- Enables both employer and employee to have a common understanding about what the job is and what it involves.
- Any newcomer to the job can be told exactly what the job entails, and what other people's jobs are.
- It can be used as the basis of an Induction course.
- It can help in the recruitment, both by providing a basis for the job advertisement and telling the applicant what the job entails.
- It can be used as the basis for assessing performance.
- It can be used to indicate the level of knowledge and skill required to do the job properly

Conduct

- Establish rapport, be friendly and enthusiastic (try not to keep candidate waiting)
- Encourage candidate to talk freely about their job and themselves
- Use open-ended questions for expansion - probe for facts
- Test knowledge and reaction (e.g. quick thinking) by hypothetical questions
- **LISTEN AND OBSERVE**
- Write brief notes of important facts, but maintain eye contact regularly - do not make note-taking distracting
- Check that all information needed to make an assessment has been collected (check interview plan)
- Give details of job and company
- Ask candidates if they have any questions
- Finish positively - shake hands, thank them for coming and state when you will be contacting them regarding the outcome
- Settle any expenses incurred

Assuming that the applicant(s) have been prescreened, the interviewer should design questions that are self-evaluative in nature. For example, he might ask the following:

"Tell me about some of the problems you encountered in your last position and how you dealt with them?"

"When do you realize that you have made a poor decision? How do you react when that occurs?"

"Where do you see yourself five years from now?"

"What do you consider to be your primary professional asset? What is your major professional liability?"

"What benefits do you see yourself deriving from the organization?"

"What is your philosophy on the management of others?"

"What values do you espouse for an organization? Do you feel your values would be consistent with those of this organization? If so, why?"

Career orientation. The applicant's immediate and long-range career goals must be obtained. In addition, the interviewee's expectations and perceptions of the position must be discussed.

Educational background. The schooling, grades, subjects, honors, and extracurricular activities of the applicant need to be obtained. Such information can give some indication of the interviewee's intelligence, initiative, and reliability.

Work experience. The applicant's previous work performance is one of the best indicators in predicting his success or failure in the position under consideration. His previous responsibilities, knowledge, skills, and reason(s) for changing positions should be explored.

Social history. The major interest here, depending on the nature of the position, is the applicant's ability to get along with others. The interviewee's activities, hobbies, community interests, and additional responsibilities may shed light on his use of personal resources.

Follow Up

- Write up notes more fully
- Assess candidate against needs in the main areas of consideration decided on earlier
- Compare with other candidates
- Make the decision
- Follow up with references

- Inform all candidates of the decision by letter within the time given to them at their interview
- Prepare training program for new member of staff

The employment interview is generally conducted within a highly structured format; before the meeting you should prepare a standardized list of questions. You should focus on factual information and at the same time observe relevant non-verbal cues: voice inflection, body posture, appearance, eye contact, and general demeanor. Since the information gathered must be organized and retained, the interviewer should take notes unobtrusively or jot down important points immediately after the meeting.

Employment or Selection Interview Questions

Typically, a wide variety of questions can be used to help gain information about a candidate's job skills. Use these questions as guides to help you develop questions which focus on a specific job's skill requirements. The questions that follow are considered behavioral because they are focused on the person's behavior in prior and related situations.

1. Describe a time in any job you've held when you were faced with problems or pressures which tested your ability to cope. What did you do?
2. Give an example of a time when you had to refrain from speaking or you were unable to finish a task because you did not have enough information to go on. Be specific.
3. Give an example of a time when you had to be relatively quick in coming to a decision.
4. Tell me about a time when you had to use your spoken communication skills in order to get a point across that was important to you.
5. Can you tell me about a job experience in which you had to speak up in order to be sure that other people knew what you thought or felt?
6. Give me an example of a time when you feel you were able to motivate your colleagues or subordinates.
7. What do you do when one of your people is performing badly, just not getting the job done? Give an example.
8. When you had to do a job that was particularly uninteresting, how did you

deal with it?

9. Give me an example of a specific occasion when you conformed to a policy with which you did not agree.
10. Describe a situation in which you felt it necessary to be very attentive to your environment.
11. Give an example of a time when you had to use your fact-finding skills to gain information in order to solve a problem - then tell me how you analyzed the information to come to a decision.
12. Give me an example of an important goal which you have set in the past and tell me about your success in reaching it.
13. Describe the most significant written document/report/presentation which you have had to complete.
14. Give me an example of a time when you had to go above and beyond the call of duty in order to get a job done.
15. Give me an example of a time when you were able to communicate with another person, even though that individual may not have liked you personally.
16. Describe a situation in which you were able effectively to 'read' another person and tailor your actions according to your understanding of their individual needs or values.
17. What did you do in your last job in order to be effective with your organization and planning? Be specific.
18. Describe a situation in your job when you could structure your own work schedule. What did you do?
19. Describe the most creative work-related project which you have carried out.
20. Describe a time when you felt it was necessary to modify or change your actions in order to respond to the needs of another person?
21. What experience have you had with a misunderstanding with a customer or fellow employee? How did you solve the problem?

22. What did you do in your last job to contribute towards teamwork? Be specific.
23. Give me an example of a problem which you faced on any job you have had and tell me how you went about solving it.
24. Describe a situation in which you were able to influence positively the actions of others in a desired direction.

Source: Adapted from More Than A Gut Feeling III

Information Gathering

Adapted from: *Investigations at Work: the art fact-finding and investigating employee complaints (2nd edition)* © 2007 Orlando Blake, PhD CPT, The Blake Group.

Purpose: To solicit information and/or feedback on awareness, perceptions, feelings, and ideas about the department, agency, organization, personnel, and/or policies. This interview is often used as part of an attitude survey directed toward the betterment of the work setting. The information-gathering interview is generally conducted in association with a written survey and is commonly completed in one session.

Preparation

Background information. You should understand thoroughly the purpose and type of information being sought. You should also know how the data being generated will be used. Before the interview takes place, you should prepare a concise outline of those items to be covered during the exchange.

Interviewee's background. An awareness of the background of the interviewee is often helpful in formulating the specific questions to be covered. In addition, you should take any known biases into consideration when he evaluates the responses.

Conduct

The questions asked during an information-gathering interview are usually open-ended—ones that cannot be answered by a "yes" or "no" response. Attitudes, perceptions, feelings, thoughts, ideas, comments, and concerns about specific issues will generally be solicited during this interview. Key questions might include the following:

"How would you go about improving the present ...?"

"When did you first observe ..?"

"What are your observations of the last ...?"

"What ideas do you have about ...?"

"How have you avoided . . .?"

"What recommendations do you have on .. .?"

"What events, in your opinion, caused ...?"

"How could we go about accomplishing

"What procedure enables you to

"What do you think the major issues are about ...?"

Key issues to be addressed should be identified openly. You should not possess any hidden agendas, or unspoken motives, for the interview; rather, you have a responsibility to inform the respondent about the rationale for the meeting and the purpose for which the information will be used. The information-gathering interview is conducted within a predetermined format (which you develop) that can provide information and feedback on the issues under investigation in the least time consuming manner. Establishing a climate of trust is essential in gaining useful data. You must be cautious about any potential violations of confidentiality and, unless otherwise agreed, must ensure the interviewee of anonymity.

Career Counseling

Purpose: To assist the interviewee in assessing alternatives to determine future professional plans and goals. The career counseling interview might be initiated by the interviewee and may require several meetings. If more than one meeting is needed, the first session should result in some plan of action for the interviewee to complete before the next meeting occurs.

Preparation

Interviewee's background. Once you have been asked to conduct a career-counseling interview, you should obtain, with the interviewee's permission, all relevant background information, i.e., work history, aptitude test results, educational background, performance evaluations, etc. This information will provide a general overview of the interviewee's previous efforts and experience.

Resources within reason. If you have some advance indication of the general area the interviewee wishes to pursue, you can gather information regarding opportunities, qualifications, and resources. Consequently, you can provide immediate information, which may be all the interviewee needs. You can reasonably be expected to acquire available resources (college brochures, information about financial assistance, or pamphlets on career options) which correspond to the interviewee's abilities and interests.

Much of your role in a career-counseling interview is nondirective since the majority of information should be supplied by the interviewee. However, to assist the interviewee further, you may guide the conversation toward the following self-assessment areas:

Strengths. You might ask the interviewee to assess his or her personal and professional strengths and their relationship to present career considerations.

Weaknesses. You might guide the interviewee in assessing previous and present personal and professional weaknesses which might hinder future endeavors.

Priorities. You should at some point acknowledge personal and professional priorities. He or she can then explore corresponding values associated with these priorities as he examines career alternatives.

Conduct

While you may furnish objective information regarding openings, requirements, organizational policies, and resources, be cautious about giving direct advice or instructions on the individual's career decision. The interviewee's choice of options must be dictated by her or his own values and motives.

Performance Evaluation

Purpose: A performance evaluation is literally, to set a value on something or someone. In this interview situation it is a two way process for you and the interviewee to indicate how they feel the work is going. The appraisal process addresses the two most important factors in motivation of people at work: "achievement" and "recognition" for work done. To appraise a person's performance over a given period against set targets in order to:

- Assess performance, building on strengths and identifying weaknesses.
- Identify areas of improvement, ways of overcoming weaknesses and consequent training needs.
- Discuss potential and future prospects.

In addition, most performance evaluation interviews develop a specific plan of action that details any behavioral changes or new strategies to be undertaken in the accomplishment of agreed-upon tasks. Additional or re-agreed upon goals may also be set. This interview is usually conducted in one session every 6 to 12 months.

Preparation

- Give due warning to allow employee to prepare
- Ask employee to think about own performance
- Study job description and targets
- Consult with others who might help assessment of employee
- Allow adequate time and avoid interruptions

Conduct

Present situation. You must learn how the interviewee perceives his or her work record. The employee can be asked to evaluate the positive and negative aspects of his or her present performance, production, goals, growth, responsibilities, etc. If you and the interviewee differ considerably in perceptions, you should discuss the interpretation of the documented evidence.

How management can assist. You should encourage the employee to consider ways in which he or she as well as the organization can assist in creating more opportunities, improving work flow, removing barriers, increasing productivity, etc.

How the employee can improve the situation. You should request that the interviewee explore alternative actions that he might take to improve performance,

increase responsibilities, meet goals, etc.

The performance evaluation interview often creates anxiety for both of you. Because the primary function of this interview is to give and receive feedback on previously specified tasks and responsibilities, documentation on performance is essential. Just as important as constructive criticism is the use of reinforcement and praise when the employee has met or exceeded the previously agreed upon level of expectation.

Key Performance Indicators (KPI's). To evaluate performance, you should be familiar with the existing KPI's agreement between himself and the interviewee. This is usually in written form and will typically outline expectations on productivity, responsibilities, and specific tasks to be completed. The KPI's provides a base from which to measure performance during the next evaluation.

Work record. Before the interview takes place, you should study the interviewee's performance record so that specific issues can be addressed. In addition, you should formulate an outline of strengths and weaknesses as indicated by the employee's past efforts.

Expectations. You should prepare a list of expectations to be used in developing the KPI's for the next time period. Therefore, you and the interviewee must be aware of the needs of the interviewee, the organization, and the other personnel affected. The working draft of the KPI's should be flexible enough to accommodate the input of the interviewee so that a consensus can be achieved in establishing an agreement.

Performance Evaluation Steps

- Put at ease
- State purpose of interview
- Ask open questions, allowing employee to talk through points raised
- Summarize points as covered
- Re-summarize at end, underlining agreed action
- Set date for discussion of new targets

Target Setting

What do you need to know to help the interviewee set targets for the next performance period?

- Who is my boss?
- What is my job?
- What standards do I have to achieve?
- How am I getting there?
- Where do I go from here?

- How do I get there?
- What training and development do I need?

Typical Questions for the Appraisal Interview

By using these reactive questions you can cut through generalities and make people answer more specifically. In this way you can more clearly assess what is being said and where the targets lie.

- What was the most interesting task you had to do this year?
- What was the most successful project in the past year?
- In retrospect, how do you feel you handled the re-organisation?
- What areas of your work would you say require more attention?
- What extra help do you need to improve those areas?
- What do you think you need to learn now to develop the job further?
- What have been the most difficult problems that you have faced?
- Where do you see your future with the organisation?
- How do you see this job developing?
- What would you say are the priorities for the next twelve months?
- I'm not quite sure I understand what you are saying. Will you please go over the main points again?

Follow Up

- Complete appraisal form, show it to employee
- Allow employee to comment in writing, and sign
- Take steps to implement agreed action
- Follow up to ensure action has taken place

Problem Solving

Purpose: To examine a specific problem, conflict, or issue that is unacceptable to the interviewee and to explore various possible resolutions. Your primary function is to assist the interviewee in developing problem-solving abilities independent of anyone else's support or intervention. The goal of the problem-solving interview is to foster critical and independent thinking. The number of sessions required to complete this interview will vary according to specific circumstances.

Preparation

You do not need to possess any previous information to be of exceptional support. In fact, prior knowledge of the specific issue or problem may lead to a biased, detrimental exchange. Exceptions occur when the interviewee has a legitimate dependency need for information that you possess or can obtain, or when the problem or the outcome is clearly your responsibility.

Conduct

Through the use of a directed approach (as long as solutions are not provided and direct advice is not given), you can guide the interviewee toward a process in which he or she can become self-sufficient in problem solving. The process involves you focusing the interaction on the following areas:

Problem awareness. You should be directed toward examining the following questions: Whose problem is this? What needs to be changed and why? How was the conflict created?

Information gathering. You should next explore the five key items: Who? What? When? Where? and Why? Sources of information and their reliability should be discussed.

Problem definition. You should next define the exact issue/problem based upon the information he or she has gathered. Then you should assist the interviewee in recognizing where his or her responsibility starts and stops in the resolution of the matter.

Goal statement. You should now be directed toward developing a specific goal, i.e., the result desired when the problem is resolved.

Solution generation. You and the interviewer should "brainstorm" together as many

solutions as possible. The primary responsibility of solution generation should fall on the interviewee. No judgments or critical assessments should be made during this period.

Solution selection. The interviewee, with some assistance from you, should then select that solution which appears to be the most effective in the resolution of the existing problem.

Implementation. A strategy should be designed for the execution of the selected solution. The interviewee must become aware that any solution she or he implements must have two primary characteristics: it must be of high quality, and it must be acceptable to those individuals who will have to live with it.

Evaluation. Whether elaborate or simple, the evaluation serves to obtain feedback on the success or failure of the implemented solution. Without the evaluation phase, the interviewee will never know if his or her strategy has been effective or ineffective. A plan for evaluation should be discussed and agreed upon before the problem-solving interview is considered complete.

Many interviewers unintentionally foster a destructive dependency relationship in their problem-solving interviews. Too often the interviewer begins to provide direct answers when there is no legitimate need to do so. Thus begins a cycle in which the interviewer's time and resources are required whenever a problem occurs. The problem-solving interview should ideally assist individuals in thinking for themselves. If employees are provided with a supportive environment, most of them are fully capable of resolving their own conflicts, and they feel better about themselves for doing so.

Counseling or Coaching Interview

Purpose: To confront and assist a problem employee in resolving those behaviors or issues that you find unacceptable. The counseling or corrective action interview is considered a high-risk exchange which carries the potential for defensiveness on the part of the interviewee. This interview is usually conducted in two or three sessions. If no progress is made, other courses of action are usually followed: termination, referral to professional help, shifting of responsibilities, etc.

A deeper purpose of a counseling interview is to help a person or to come to terms with a problem which is affecting his or her work. To discuss and advise on problems affecting a person's work with the object of solving or alleviating the problem, bearing in mind the needs of both the employer and the individual.

Preparation:

- Plan approach according to individual
- Ensure privacy
- Allow adequate time
- Check details
- If applicable, addresses of specialists who could help:
- Check file on individual

Documented evidence. When interviewing the problem employee, the interviewer must possess documented evidence of the unacceptable behavior(s) or attitude(s). If the interviewer does not have documentation, he leaves himself open to potential legal and emotional repercussions.

Directed expectations. The interviewer must clearly formulate his expectations for change or modification within a given time frame. In addition, the interviewee has a right to know the consequence(s) he faces if he does not meet these expectations.

Referral sources. In cases involving emotional or physical problems, the interviewer should, prior to the interview, have prepared specific recommendations for referral sources.

Conduct:

- Interview in private
- Put at ease
- Establish rapport
- Show understanding not sympathy
- Establish problem clearly

- Guide interviewee to finding out solution
- Get them to identify courses of action
- Use open, reverse, and reflecting questions
- Listen carefully
- Be sincere and show you wish to help
- Be sensitive and understanding
- Maintain confidentiality if possible
- Come to a positive conclusion with positive ideas and points for action

Perceptions. The interviewee must be allowed to share his or her perceptions of the situation or problem, for you might be unaware of extenuating circumstances. In many cases the problem is nothing more than a misunderstanding that can be clarified easily during the interview.

Emotional airing. If you consider yourself capable of conducting, and then decide to engage in, an interview that allows the interviewee to air emotional concerns, then you may choose to use the following techniques: reflective listening (repeating back the interviewee's key words to underscore concern and investment in being of assistance), dynamic listening (listening between the words and repeating back those feelings that may underlie the interviewee's concerns), and silence (simply saying nothing while allowing the interviewee to take responsibility for the amount, intensity, and depth of the interaction). Emotional airing is effective with many individuals if you are competent in the use of listening skills and are willing to make the investment in time.

There are many reasons for deteriorating or poor job performance. Consider these as clarify the need and your approach for a counseling interview:

- Wrong person in the job (poor selection procedures)
- Poor induction procedures; the person doesn't know where they fit in or precisely what they are meant to be doing.
- Job has changed; new skills needed
- Low morale; uncertainty about the organization, people in the dark about progress, Not involved/informed/consulted
- Not valued/appreciated (or no-one remembers to tell them that they are valued)
- Don't know if what they are doing is right
- Job too vague - too much to do - overwhelming
- Poor Job Description
- Being asked to do too little (!)
- Boring/repetitive work - no new challenges under-achieving
- Antagonism - personality conflicts
- Stress and emotional problems (flight/fight)

- Environment
- Incompetent management
- Unprofessional management (sexist/racist)
- Threatening management
- Politics (who you know is more important than how you are doing).
- Mental illness (1 man in 7 and 1 woman in 4 suffer from some mental illness during their lives)
- Alcoholism
- Drug/substance abuse
- Medical disorders

Follow Up

- Arrange for future interview to check developments
- Carry out any action promised

Grievance or Employee Complaint Interview

Adapted from: *Investigations at Work: the art fact-finding and investigating employee complaints (2nd edition)* © 2007 Orlando Blake, PhD CPT, The Blake Group.

Dealing with complaints can be tricky. If you keep these guidelines in mind it will help:

- Don't overreact
- Don't confuse opinions with facts
- Respect confidences
- Don't criticize
- Don't criticize others
- Don't assume
- Listen – don't promise what you can't deliver

Purpose

- To enable the individual to air the complaint.
- To discover and remove causes of dissatisfaction if possible.

Preparation

- Try to establish circumstances causing dissatisfaction (particularly attitudes, feelings)
- Consult with people concerned, check previous record/history
- Be aware of grievance procedure which may affect action which can be taken, and
- Your own limits of authority and the company policy.

Conduct

- Put at ease
- State purpose of interview
- Allow individual to state the grievance/problem
- Get feelings as well as facts - feelings are frequently paramount, facts minimal
- Listen attentively
- Do not evade the issue or belittle it
- Probe in depth to ensure all relevant details are known
- Check facts
- Do not commit yourself too quickly
- If possible get individual to suggest solutions
- State proposed course of action:
 - if the grievance has been resolved as a result of the meeting - what is

- to be done
- if more information is needed arrange another interview with the person to discuss action
- if you cannot resolve the grievance, refer the person to the next stage of procedure
- never say `leave it with me'

Follow up

- Implement agreed action
- If not passing to the next stage of procedure, check at a later date that grievance has been resolved satisfactorily.

Disciplinary Interview

Any disciplinary action must always be preceded by a well structured and controlled interview. All disciplinary actions must be in strict accord with a written procedure. The objective of a disciplinary interview is to inform an individual of, correct, poor work or unacceptable behavior, by helping the person to improve - thus preventing the situation from arising again and to establish an understanding of the standard required and to give guidance to the person in achieving this standard. Even for the most apparent, blatant gross misconduct, you are encouraged to suspend, with pay, while you carry out a thorough investigation.

If you have good, clear job descriptions with KPI's and Standards Of Accepted Performance (SOAP) clearly laid down, then it makes any disciplinary action you have to take much more straight forward. If you have effective Problem Resolution Policies and Procedures and a good appraisal system, Disciplinary Interviews should seldom be needed.

Most important - three quarters of the process - is to try to get the interviewee to "own" the problem; i.e. to identify the gap or the problem themselves.

Guidelines for Embarking on Disciplinary Action

Remember all your actions and comments may have to be defended at a tribunal, grievance committee or formal hearing, or in court. Even for those who would not be eligible to go to a formal hearing, it is good practice to treat everyone with the same degree of consideration and courtesy.

- Fully understand your responsibilities and authority within the organization's procedures.
- Before giving a formal warning, ensure you have done all you can to improve the situation.
- Inform the shop steward (where appropriate) of your action, provide an opportunity for representation.
- Keep a record of the date of the interview, the name of the staff member, the reason(s), and details of witnesses.
- Ensure the staff member understands the consequences of failure to improve.
- Set a time for review and keep to it.
- If you are not sure - **CHECK**
- Maintain close contact with other management team members to ensure consistency, try and help the staff member improve.
- Employees with limited English – provide a translator
- Where there is collective bargaining agreement – follow the process to notify and liaise with the union representative.
- Any disciplinary action must always be preceded by a well structured and

controlled interview. All disciplinary actions must be in strict accord with a written procedure.

Preparation

- Gather the facts (consult others, records, rules and procedures)
- Do not prejudge the issue
- Plan the approach according to the individual concerned
- Ensure privacy and no interruptions
- Allow adequate time
- Clarify the disciplinary actions available to you
- Notify the time, place and reason for the interview
- Notify others who may be concerned that the employee will be absent from the place of work, especially first line supervision
- **Check** your disciplinary procedure, i.e.
 - should you involve a representative?
 - does the employee know the procedure and appreciate the consequences?
- Advise the individual of the right to be represented by the union and ensure that representation can be available at the agreed time

Conduct

- State the reason for the interview briefly giving those details of behavior or performance which have caused concern
- State the standards which your organization expects in relation to the matter under consideration
- Establish facts promptly
- Obtain witness statements if applicable
- Identify the '**gap**' between standards expected and those achieved
- Ask the interviewee **why** this 'gap' exists. Encourage the employee to talk and to give a full explanation, and if involved allow the representative to comment
- **Listen** closely and make notes of what the employee says in order to establish the cause
- Having listened to the explanation **decide** whether disciplinary action is warranted and what **action** to take, if any, and **inform** the interviewee. At the same time advise the individual and the representative of any rights to appeal which may exist.
- Now switch to the **future**, and get agreement on how to bring performance back to standard by encouraging the interviewee to make suggestions
- Offer **help** where this is possible
- Set an agreed **review date** for the purpose of monitoring progress and state what the consequences of failure to meet standards will be

- Agree a date to review progress/plan - quite useful, especially
- You don't have to say at the end of the interview what you have decided, but you should say when you will let the interviewee know your decision.

Note: Do not negotiate on your actions. Make this clear at the outset.

Follow-up

- Record the interview
- Check: future behavior, attitude and performance against time limits on the agreed dates
- Check that help is given where this is either required or has been agreed with the individual
- Encourage and praise improvements
- If the required standard is met over a reasonable period consider removing file notes, and in any case check the steps to be taken within the written procedure
- Look at what you could have done as a manager which would have prevented the breach of discipline

Termination Interview

Purpose: To end the interviewee's employment or to assess why the employer is terminating his or her employment. The purpose of this interview, in either case, is to give and receive feedback on the rationale for termination and to reach a state of closure. Many termination interviews are dealt with in one session although circumstances and/or foresight may necessitate the use of several meetings.

Additionally, to discover a person's true reasons for leaving the organization with a view to taking any required action to prevent others leaving for the same reasons. Such reasons could be:

- Poor recruitment selection
- Inadequate training
- Company policy
- Salary
- Management/supervision
- Personality clashes

The second reason to conduct a termination or exit interview is to secure employee's goodwill and company's reputation.

Preparation

- Check resignation letter for reason stated
- Study employee's records and personnel file
- Where necessary check with other appropriate people, e.g. supervisor, etc
- Ensure privacy and no interruptions
- Allow adequate time

If you are terminating the interviewee's employment, you should possess the following:

Documented work record. The reason(s) for dismissal should be fully documented. Infractions, tardiness, poor productivity, absenteeism, warnings, and other relevant information should be in hand. A documented work record reduces the potential for a personal confrontation and provides the employee with indisputable facts concerning the specific rationale for termination.

Transitional information. Prior to the actual interview, you should have a plan for the transition of responsibilities from the terminated employee to existing or newly hired personnel. You should discuss with the employee the lead time before

termination, compensation (if any), and any other issues regarding closure.

If the employee is voluntarily terminating employment, you should possess the following information:

Feedback on impact. If you are given advance notice, you may want to study the work record of the employee to provide open and direct feedback on his value to and impact on the organization/agency. This can provide for a constructive learning exchange during the course of the termination interview.

Transitional plan. You will be required to assess all issues regarding closure, including the length of time before the end of employment, the training of new or existing personnel assuming the interviewee's responsibilities, and any other foreseeable tasks associated with the change of position.

Conduct

- Put at ease - thank interviewee for coming
- State the purpose of interview
- Encourage and allow the employee to talk freely about the job, the company and the people
- Ask open ended questions
- Listen and observe; be alert for clues to underlying reason - this often differs from the reason that is stated on letter of resignation
- Thank employee for services rendered and wish them well

The termination interview provides an excellent opportunity to explore the reasons for separation. If employment you terminating the employee, you may want to obtain the following:

Feelings, thoughts, and ideas. The termination of employment is often a difficult meeting for both of you. If you are willing to listen with sensitivity to the employee's feelings, thoughts, and ideas about the set of circumstances leading to his or her dismissal, you may be able to defuse a potentially high-anxiety encounter. In addition, the feedback given by the interviewee on his or her perceptions of the work setting may prove to be valuable input for future consideration.

If the employee is voluntarily terminating employment, you should attempt to obtain the following:

Feedback. You should attempt to discover why the employee is terminating employment and any specific suggestions he or she may have for improving the organization or the interviewee's specific position. The use of nondirective questions

can assist in this process. Examples include:

"Would you be willing to share your perceptions of the work environment?"

"What suggestions do you have for improving the organization/ agency?"

"What strengths and weaknesses did you observe during your time of employment?"

"How can management better meet the needs of employees?"

The termination interview is considered a high-risk exchange which carries the possibility of either party's becoming defensive. If uncontrolled emotions take over, the interview may develop into a destructive meeting in which the interviewee, you, and organization lose. Yet, if you prepare adequately and conduct the interview in a nonthreatening manner, you can diminish the likelihood of a counterproductive interaction. You must avoid placing yourself in a position of defending the company/organization/agency and instead must foster constructive feedback while attending to the necessary transitional issues.

Follow Up

Decide if any action is necessary in the light of information gained and implement accordingly.

Improving Your Interviewing

The only way to become a competent interviewer is to practice. To improve your skills you can use this book and practice with someone else. To become an accomplished interviewer, it is critical to recognize and filter your own prejudices. A greater degree of self understanding will help you appreciate your biases and understand how they impact the interview situation. Try some impromptu role playing with a colleague or friend. Get some feedback from them and provide them with assessments of their style as well. The purpose of practicing is to enable you to become an interviewer who is aware of both the objectives of the interview and of the skills which you must apply to achieve them.

Orlando Blake, PhD CPT

As a licensed Unitive™ Coach, Dr. Blake's more than 25 years of executive, consulting and coaching experience is uniquely diverse. His clients come from commercial printing, consumer products, food processing, healthcare, heavy engineering construction, government, utilities, entertainment, and defense.

He received his masters from the University of Southern California, with a specialization in applied behavioral sciences. He followed this with a doctorate and breakthrough research at Claremont Graduate University that discovered unique techniques to resolve disputes. Harvard has included his research in their study of critical moments in negotiation.

In addition to Dr. Blake's nationally recognized consulting and coaching practice he was a columnist for the maquilladora-focused Twin Plant News™. Dr. Blake's books include:

- *Leading the Total Quality Mission: aligning principles, practices & management*
- *Leading Continuous Improvement: building capability & commitment*
- *Leading Total Quality: management's role in aligning leadership & total quality practices*
- *POWW! Mediation & Facilitation for HR Professionals*
- *POWW! Stop Fighting & Start Talking for Managers*
- *Life's Path: make a choice that brings you happiness*
- *Investigations at Work: the art of fact-finding & investigating employee complaints*

Dr. Blake teaches alternative dispute resolution for University of California, Riverside, and several courses for Claremont Graduate University in the School of Behavioral and Organizational Science and Regional Commerce for the University of Arizona

As a result of his commitment to human potential and performance improvement, he was awarded the experienced professional designation of Certified Performance Technologist (CPT) from the International Society for Performance Improvement (ISPI).

He is passionate about human development and strives always to ensure that every individual, team and organization he works with is able to achieve its short and long term goals.

You may learn more about The Blake Group and his Leaders Path Coaching Retreat on the web at: www.blake-group.com and www.leaderspath.net



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