



SAMPLE - Role Play Toolkit

A resource for Trainers & Facilitators





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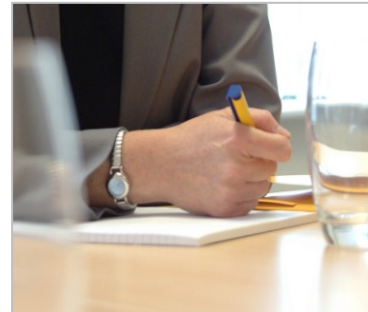
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Guidelines for Observers

Introduction

As an Observer, your role is crucial in helping the other role players understand what they did/ said, and how they might change their behaviour as a result of the role play. These guidelines will help you understand the role of the Observer and how to feedback at the end of the role play.



For most of the role plays in this toolkit we have included 'Observer Checklist' templates to facilitate the capture of behavioural evidence during the observation period.

Hints and Tips

- Capture what you observe - the exact words used or the behaviour observed. Here are some good examples:
 - *Used open questions, followed by probing questions e.g. "How do you feel about what I've just said?" followed by "What exactly do you mean by that?"*
 - *Looked down at notes too much - not enough eye contact. Looked at the other person's tie when asking questions*
 - *Was assertive by saying "Yes, Joe, I do recall you apologising for being late however it still doesn't alter the situation that it was the third time in 2 weeks"*

In team building exercises:

- *Asked John's opinion on a suggestion about how to implement the process i.e. "John, what do you think about that suggestion?"*
- *Jane suggested that they have a timekeeper, and they should flag up to everybody when they are at the '10 mins to go' point*
- *Scowled (furrowed eyebrows, mouth tight lipped) at suggestions/comments from other team members (e.g. Ali's suggestion to re-read the instructions). Stood cross armed, shaking head twice over about a minute*



Feedback Process

When you are ready to feedback, a suggested process could be:

1. Ask the **Main Role Player** (e.g. the Coach; the Interviewer; The Disciplining Manager):
 - How do you think it went?
 - What went well?
 - What might you do differently next time?

2. Ask the **Other Role Player** (e.g. the Coachee; the Interviewee; The person being disciplined):
 - What was it like being on the receiving end?
 - What was good about it?
 - What could have been improved?

3. Give your view as the **Observer** with positive feedback **first**:
 - The things that went well
 - The things that could have gone better
 - Your opinion of how the Main Role Player came across to you, if you were the other role player
 - Summarise your feedback

If one person says that you are a horse, smile at them.
If two people say that you are a horse, give it some thought.
If three people say you are a horse, go out and buy a saddle.

PROVERB



Appraisal Skills 1

APPRAISEE Brief

- You are a Warehouse Assistant. The Appraiser is your Team Leader. This is your first annual appraisal.
- The job's great during the summer. However you find it difficult coping with the cold in the winter. You're reluctant to complain about it - but if they press you enough in the appraisal, you're going to mention it.
- You feel as if you do a good job - you are fast and accurate. You're also willing to help others out too. However your Team Leader rarely gives you positive feedback and they don't hold back when things go wrong. For example:
 - 2 months ago you had a spate of lateness. After discussions with your Team Leader, you improved and you have been in on time since - well, apart from last week when you came in 20 minutes late. Your Team Leader said something about phoning in, but it was difficult being stuck in that traffic and you're certainly not going to use your mobile - at 30p per minute!
- You have always fancied getting into an office-based job. You would like to talk about it at your appraisal but are worried that you'll upset the boss. They might take it personally, that it's something to do with them.



Appraisal Skills 2

APPRAISER Brief

- You are the Customer Service Team Leader in a Contact Centre. The Appraisee is one of your Advisors. This is their first annual appraisal (they started in this job 9 months ago).
- Generally, they are a good worker, relating well to customers and being particularly good at managing the irate ones.
- They have improved the average duration of their calls from 8.5 minutes to 7.2 minutes over the last 6 months. However you still require improvement. The department average is 5.8 minutes.
- You have noticed that they do tend to be a bit chatty on the phone with customers. This is good for customer service (some customers are just 'looking for a friend', particularly the elderly) however there is always pressure on you from above to drive the call durations down.
- The Appraisee has also received 3 customer letters in the last 9 months, complementing them on their patience and helpfulness. Only Jane, your most experienced Advisor, has had more letters.
- You feel that this Advisor is not team leader material.



Appraisal Skills 3

APPRAISEE Brief

You are a Despatch Assistant. Your Appraiser is your Team Leader. You have been with the company for the last 15 months. This is your first annual appraisal.

You feel that you are a good worker, and very rarely make mistakes. Even the Operations Director was pleased with you a few months ago and e-mailed your Team Leader to say so. You also look after new starters - show them the ropes when they come onto the department.

Unfortunately, some errors have crept into your work. For instance, about 3 months ago, you signed for a delivery of components that was a consignment of 4 boxes. However there were only 3 boxes off-loaded. The delivery driver rang up a couple of hours later to explain that the 4th box was still on the lorry.

Then last month, the Team Leader overheard you saying to a delivery driver: *"Yeah that looks okay - 25 boxes in the delivery"*. You got an earful for not counting. You didn't think it was justified as you can trust Fred, the delivery driver. He's been on our delivery run for years. Anyway, you are under increasing pressure in your job. You were only trying to save time (you've told the boss on a few occasions that the department is under-staffed).

You are very happy doing this role. Retirement is only 4 years away. However you have heard that the company provides a Personal Effectiveness self-study workbook for those employees who are interested. It covers 'influencing skills'. You're quite interested in the pack, particularly as you get an hour for lunch, and twiddle your thumbs for most of it. However you're a little embarrassed to ask about training at your time of life!

Appraisal Skills 4

APPRAISER Brief

- You are the Finance Supervisor. The Appraisee is one of your Assistants. This is their first annual appraisal.
- Normally the Appraisee is a good worker, uses their initiative and is really helpful. For example they have the responsibility of running the stationery cupboard for the whole Finance and Marketing departments. You even received an e-mail from the Finance Director 3 months ago, praising their helpfulness and organisational skills. For a director to take the time out to do that, she must have been impressed!
- Unfortunately, the Appraisee has been prone to some errors in recent months. For example:
 - On one batch of data input he/ she made 3 keying errors - one error meant that a company was invoiced for £50 instead of £500.
 - Forgetting to return a key client's call. You had a rather irate person phoning you to complain.

You spoke to the Appraisee after each occasion. However you still sense that, at times, better care could be taken. It's not a disciplinary matter however it is something you would like to address.

- One of your team, Janet, left 4 months ago and, because of budget cuts, wasn't replaced.



Appraisals - Observer Checklist Page 2

Strengths

Asks the Appraisee what they think and secures agreement

Clearly states their opinion of performance using examples where necessary

Summarises regularly

Covers:

- Past performance
- Future objectives
- Training and development
- Career development
- Issues/ Ideas

Part

Asks if there is anything missed out

Explains what happens next

Thanks for their time

Asks for feedback

Development Area



Assertiveness 3

ASSERTIVE PERSON Brief

- Tonight, you are going to << *invent something you are passionate about e.g. ten pin bowling; football; see a relative; going to the pictures*>>. You really want to go.
- Your boss is coming towards you in the corridor and will be making a request of you.

OTHER ROLE PLAYER Brief

- You need to ask your team member to work late tonight at short notice - about 3 hours extra.
- You are approaching him/ her now.
- Be persistent - don't take no for an answer.



Influencing 2

INFLUENCER Brief

- You are a Team Leader. The other role player works for you.
- He/ She, like the rest of your team, has been flexible in the past, although they are the sort of person who lets you know how good they are, at every opportunity.
- This Sunday has been a long standing 'Call' Day for your employee, where you could ask them to come in, if required.
- One of your team has just gone down with chicken pox. You already have a vacancy on your team, and another on two weeks holiday.
- You are running out of options. It has to be this employee.
- As he/ she has gone home, you leave them a note on their desk.
- The following day, as you come into the office, the employee comes to see you. They are not looking very happy

INFLUENCE the role player to do the Sunday willingly. Try not to resort to threats, cries of *"It's in your contract"* or *"I'm your manager so you'll do what I say"*.



Influencing 3

INFLUENCEE Brief

- You are an Administration Assistant. The other role player is your manager, and has a total of 10 staff. Your normal start time is 9.00am.
- Your manager has introduced Thursday training sessions at 8.30am. You are very reluctant to come in earlier. You don't see the point, as you've been with the company 18 months, and you feel you don't need the training. Besides, you go clubbing until 1.00am most Wednesday nights, so you need as much beauty sleep as you can get.
- Your manager has asked to see you.

In the role play:

- Act in a way that presents the Influencer with a realistic (not impossible) challenge. You are free to use your imagination and create a character that fits the information presented above, as long as it is reasonably realistic.
- Be prepared to be influenced positively if the other role player discusses issues with you openly, engages you in dialogue and seeks your agreement.



Influencing 6

INFLUENCER Brief

- You are a team member. The other role player is your manager.
- You have worked for this company for 4 years, having worked for your Manager for the last 2 years. The work is very enjoyable however you get very little development time from the boss, and you are very keen to get on. The manager does the annual appraisal every February with you. Lots of promises are made, however nothing seems to get done. There's always an excuse.
- Samantha, who does a similar job for a different boss, always seems to get plenty of time with him - reviewing performance, action planning, different projects, extra responsibility. She's even spent some time in another part of the organisation for a couple of weeks on secondment.
- You are determined to tackle your manager about this. An opportunity has just cropped up to sit down with him/ her.

INFLUENCE your manager to give you more time to develop you. Make sure you get a firm commitment such as the first 'coaching' session put in the diary.



Influencing 6

INFLUENCEE Brief

- You are a manager. The other role player is one your team members. They have worked for you for the last 2 years, and been in the organisation for 4 years.
- Appraisals are completed with all staff members every February.
- You are a great believer in making your own opportunities in life. You had to when you were looking to be developed and promoted. Nobody put it 'on a plate' for you.
- As a really pressurised manager, you sometimes don't have as much time for your staff as you would like.
- Your team member has arranged for a chat with you. He/ She wouldn't say what it was about. Here they come now.

In the role play:

- Act in a way that presents the Influencer with a realistic (not impossible) challenge. You are free to use your imagination and create a character that fits the information presented above, as long as it is reasonably realistic.
- Be prepared to be influenced positively if the other role player discusses issues with you openly, engages you in dialogue and seeks your agreement.



Team Working

Suggestions for Team Working Exercises

4 simple, easy-to-set-up team working/ building exercises that have worked well in the past.

Magic Carpet

Task

Participants start the task standing on the carpet. The objective is to turn the carpet completely over, **without** anyone stepping off the carpet.

Duration

25 minutes plus review time.

Materials Required

- Piece of carpet/strong plastic sheet - Size 1.8m by 1.2m, based on 6 participants per carpet (proportionally less, or more, for different participant numbers)
- Stopwatch
- Prize (e.g. box of sweets) if 2 or more teams

Number of participants

Between 6 and 12.

Instructions

- Make enough room to lay out the carpet
- Explain the task objective
- Allow a 10-minute planning period in which they are not allowed to touch the carpet
- Task starts by all participants standing totally on the carpet
- No touching walls, desks or any other structures
- No heels half-off carpet
- Time allowed is 15 minutes

Tips

- Do **not** give any further guidance than above
- If participants query anything, repeat the guidelines
- If 2 or more teams, make the activity competitive, with the fastest team winning the prize

Team Working: Guidelines for Observing

- If numbers allow, it can be very effective to select Observers from the group of participants and allow them to feed back their observations after the role play
- Ensure that Observers are:
 - Happy to participate as Observers
 - Not afraid to give honest feedback
 - Well respected amongst the group
 - Are objective and balanced in their nature
- Carefully brief Observers beforehand, using the Guidelines for Observers in this toolkit (page 6)
- Choosing 2 Observers means more detailed, consistent feedback, particularly when they can confirm observer notes prior to giving feedback
- Brief Observers on the use of the **Observation Sheet** and **Observation Feedback** documentation on the next 3 pages



Team Working: Observation Feedback - Page 1

Observation	Your Comments
To what extent were aims/objectives/process agreed as to how they will tackle the task?	
How did they split the roles - e.g. Who leads? Who is the timekeeper?	
Who contributed the most / least? Did anyone dominate?	
How did the team receive suggestions? Who suggested ideas and how were they received?	
Was everyone kept informed of progress/ involvement in the project?	
How well did team members support each other? E.g. say things like <i>"Yeah, I agree with Jane - that's a good idea"</i> , help each other out/ offer to help?	



Coaching 1

COACH Brief

- You are the I.T. Team Leader. The other role player is one of your I.T. Assistants. There are 11 people in your team.
- He/ She has worked for the company for the last 3 years. Their performance is very good, probably one of your best people. He/ She thinks ahead, is enthusiastic and cheerful.
- The telephone tends to be very busy with calls from internal departments and external customers. Queries include customers chasing progress on technical jobs, forgotten passwords or an inability to use the software.
- One aspect of your Assistant's performance you wish to improve is their telephone message taking. Frequently he/ she will take the first name of the person, and 1 or 2 words of a message but no date/ time or contact number for the caller. He also doesn't sign the message. Consequently, if you have a query with a telephone message, you have to decipher the handwriting on the message to establish who took it. It tends to waste time.
- You are about to run a coaching session to help him/ her improve this aspect of their performance.

Coaching Tips to Improve Performance

- Don't tell, but **ask**. For example **ask** about their level of performance; **ask** about how they will change; **ask** how they feel about being coached/ putting the new skills into practice.
- Try the 'Blue Peter' technique - here's one I did earlier - or here's one that you did earlier (e.g. a message that states 'Call John. Urgent!').



Coaching 2

COACHEE Brief

- You are a Customer Service Advisor. The other role player is your boss, the Customer Service Manager.
- You have worked for the company for the last 2 years and thoroughly enjoy your job. It's challenging, always busy, but great when you get customers telling you how helpful you've been.
- You work both face-to-face and on the telephone dealing with customers. You find forceful customers very difficult to deal with, so if they ask to speak to a manager, more often than not, they get their way. Also, when you get a situation that's not 'run of the mill', you feel that it should be dealt with by the manager.
- You are about to sit down with your manager for an informal coaching session.



Coaching 3

COACH Brief

- You are the Telesales Team Leader. The other role player is one of your Telesales Advisors, selling p.c. s.
- Generally you are pleased with his/ her performance, having been in the top 5 salespeople, 3 weeks out of the last 7. He/ She is very gregarious, and upfront. Some people might describe them as being 'very full of them self' to the point of being cocky. However, this doesn't come across to customers.
- You have remote listened to their sales calls. They develop a good rapport with the customer, and take on board the customer's need. However, there is low evidence of selling technique. For example, he/ she listens to what the customer requires the computer system to do, but doesn't probe more to suggest other uses. Invariably, the customer says internet (that's what the son or daughter wants), but doesn't explore games and word processing. Invariably he/ she offers a mid range computer, losing the opportunity to sell up to a higher specification p.c.
- You know that your Advisor has recently bought a car and the hire purchase payments are steep.
- You are about to run a coaching session to help him/ her improve this aspect of his performance.

Coaching Tips to Improve Performance

1. Don't tell but **ask**. For example, **ask** about their level of performance; **ask** about how they will change; **ask** how they feel about being coached/ putting the new skills into practice.
2. Ask the customer what the computer system will be used for; who will be using it; how much are they looking to *invest* (not spend); what hobbies and interests does the customer have; what is their current knowledge of p.c. s?
3. Introduce support packages (i.e. warranties) for peace of mind.



Coaching 4

COACHEE Brief

- You are the Distribution Assistant. The other role player is your Distribution Supervisor.
- You have worked for the company for the last 2 years. Your performance is generally very good. You use your initiative, are enthusiastic, organised and a good team worker.
- Using email is a very important feature of your job, particularly sending emails to customers to keep them informed on the progress of their deliveries.
- You tend to be quite chatty in your emails and perhaps don't always phrase them correctly. You guess it reflects your personality - approachable, friendly manner. You haven't got time to re-read your emails or get someone to check them over. You're just too busy.
- One thing you pride yourself on is the promptness of replies. You have a personal standard of replying to most emails within 4 hours.
- You are about to sit down with your Supervisor for an informal coaching session.



The Performance Coaching Interview (continued)

- There are 3 stages to the P.C. interview:
 1. **Discuss the gap** - reviewing the 'history' of performance and shortfall in the standard, and gain agreement from the employee that they understand
 2. **Explore reasons why** with the employee
 3. **Close the gap** - exploring solutions with the employee, and pledging to improve the situation

- An action plan for improvement is agreed with the employee, and put in writing to them.

In companies where it was introduced, the P.C. interview led to a considerable reduction in the number of disciplinary hearings being carried out (in one case, around 30%).



Managing Performance 1

PERFORMANCE COACH Brief

- You are the Warehouse Supervisor. The Coachee is your Warehouse Assistant.
- The Assistant's normal start time is 9.00am, for which they should be on the department ready to start work. In the last 3 weeks they have been late 5 times - 4 times by 10 minutes and once by 25 minutes, mentioning something about road works, however they don't seem to be too bothered.
- Sometimes they are on the department up to 10 minutes early and start work, however so does everyone else. Besides, personally you only get paid from 8.30am although you often start work before 8.00am.
- On each occasion you have given them informal feedback about the situation.
- You have no complaints about their performance at work. In fact they are one of your best workers.
- You have invited them to a performance coaching interview.



Managing Performance 5

COACHEE Brief

- You are an Accounts Assistant in the Finance department. The Performance Coach is your Finance Manager. There is also a Senior Accounts Assistant called John in your team. He is someone you don't particularly like. In fact, being honest, you think you could do a better job than him.
- You have worked for the company for the last 4 years. You are the longest server in the department.
- As well as the day-to-day accounts processing (like your colleagues do), your role also involves more complex tasks requiring an in-depth knowledge of the accounting system, and require you to do research. Your view is that people should concentrate on the tasks they are good at, and let others get on with the more menial duties.
- Yesterday, an incident blew up. John asked you to tidy the bookshelves and the stationery cupboard (tasks that are normally rotated around the accounts staff but no formal rota exists). You 'kicked up a fuss' but grudgingly did it. Well it's stupid, expecting his best Accounts Assistant to waste time on a trivial task like that. What really annoyed you was that just before 'the incident', one of the other Accounts Assistants had been on a long personal telephone conversation and John didn't do anything about it - so unprofessional!
- Accounts Assistants tend to take it in turns to go to the coffee machine. You love coffee.
- Your Finance Manager has invited you to a performance coaching interview.



Managing Performance - Observer Checklist

Discuss the Gap

Thanks team member for attending. Offers refreshments

Explains the purpose, process and duration of the meeting

Relays facts on performance/standard

Gains agreement on the gap

Explore reason why

Asks open questions (What, When, Why, Where, Who, How)

Uses assertiveness

Displays positive body language

Establishes reason for poorer performance/ conduct

Close the Gap

Looks forwards not backwards

Asks the team member's opinion

Agrees a target to aim for

Asks about further development needs to support

Sets a review date

Parts positively

Strengths

Development Areas



Disciplinary 1

DISCIPLINING MANAGER Brief

- You are the Despatch Manager. Your employee is one of your Despatch Assistants.
- Your Assistant has worked for you for the last 3 years. Normally they have been a good worker, but are prone to making mistakes, particularly in paperwork errors, over recent weeks. He/ She is a very chatty, personable employee - probably too chatty and too personable for your liking.
- **2 weeks ago**, you held a performance coaching interview with them. They had not counted off boxes being delivered on a lorry, so consequently some were left behind on the back. Your Assistant has also been very casual with another delivery driver. You had overheard them saying to the delivery driver: - *“Yeah that looks okay - 25 boxes in the delivery”*. You did not observe them counting the boxes.
- **This week**, another error - this time in paperwork. Your Assistant had signed out the wrong item to an Area Manager, who was to deliver it to a customer. It wouldn't have been so bad if the courier company hadn't already delivered the wrong item the week before. Now with the customer threatening Watchdog and trading standards, clearly they are not very happy.
- You informed your Assistant that you will be hosting a disciplinary hearing with regard to their standards of performance.



Disciplinary 4

DISCIPLINING MANAGER Brief

- You are the Customer Services Manager. Your employee is one of your Customer Services Agents.
- He/ She is a really good worker (when they're there!).
- Unfortunately he/ she has just had her 13th day of sickness this year. As you are aware, the company requires you to chat more formally to an individual who goes over 7 days of sickness in a rolling 12 months.
- You have given informal feedback to them on previous occasions, in the corner of the office. There didn't appear to be any pattern to the reasons - not feeling very well and migraines seem to feature, although he/ she's not the most talkative of individuals.
- You have invited him/ her to a disciplinary hearing to discuss the issue further.



Disciplinary 5

EMPLOYEE Brief

- You are an Account Executive. Your boss is the Account Manager.
- You know that it is a company rule that if you are away from your desk (e.g. at lunch) you should log out of your computer and divert your e-mail to another colleague.
- You feel pornography is vile and wouldn't use the internet for that purpose, especially at work. You would take great offence to anyone suggesting that you would.
- You are well aware that you shouldn't give your computer account password to anyone else. In the past, you have divulged your password to a couple of close colleagues.
- You took your lunch today between 12 and 1 o'clock. You went out for a sandwich by yourself and bought a book from WH Smith. You started reading the book in the park.
- Your Boss has asked you to attend a disciplinary hearing at the end of the day. He said something about misuse of your computer.

PLAY an employee who would be grossly offended at any suggestion (implied or otherwise) that you would view pornography. Also be reluctant to disclose that you may have shared your password with others. Try to deflect the conversation.



Recruitment Interviewing - Observer Checklist Page 2

	Strengths	Development Area
3. Supply		
	Describes role enthusiastically	
	Supplies positive, inspirational information about company/ team/ role	
	Sells benefits package to candidate	
	Asks for candidate questions	
	Answers questions positively	
	Checks for any further questions	
4. Part		
	Confirms candidate's interest in position	
	Explores candidate's other job applications to test out 'competition' (e.g. <i>"How are your other job applications going?"</i>)	
	Informs of next stage and timescales	
	Thanks candidate for attending	



Dealing With Irate People 1

EMPLOYEE Brief

- You are a Finance Analyst for a large company. The other role player works in the Marketing department upstairs.
- It's around 3pm and turning out to be a bit of a bad day. One of the team has gone sick and computer problems have meant that you haven't been able to run off any reports. Lunch was just a quick sandwich. You haven't had a minute to yourself.
- The other role player is due to come into your department to pick up a report. You had told them this morning that if they pop in just after 3pm, it should be ready. It isn't ready and the earliest time for it to be done is first thing tomorrow morning.
- At that moment, the other role player walks into your office.



Dealing With Irate People 2

EMPLOYEE Brief

- You are a Sales Advisor for a national chain of florists. The other role player is a regular customer.
- You had your day off yesterday.
- You have only been in 15 minutes this morning when the customer comes into the shop, not looking too happy.



Dealing With Irate People 2

IRATE PERSON Brief

- You are a regular customer of your local florist, one of a national chain of shops. The other role player works in the florist shop.
- This morning, you realise that the flowers your grand daughter had bought you yesterday from this shop, have started wilting already.
- You enter the florist to complain.

Play:

- Irate and annoyed.
- Insist that they are to blame. You want it put right with a telephone apology to your granddaughter, replacement flowers and £10 goodwill gesture.
- Threaten to go to the Managing Director.



Dealing With Irate People 4

IRATE PERSON Brief

- You are a Patient approaching a doctor's reception to report for an appointment. The other role player is the Receptionist.
- The Receptionist is seated at their desk talking to someone else, seated next to them. You wait patiently for what seems like ages for the Receptionist to finish their conversation. He/ She has just glanced up at you very briefly, but gave no acknowledgement, and carried on their conversation.
- Blow your top at him/ her. How dare they! Demand to see her Manager.



Dealing With Irate People 5

EMPLOYEE Brief

- You work in a hospital ward that is normally locked outside of visiting hours. It's 1.30pm. The other role player is a patient who wants to visit a patient.
- The ward has recently implemented a policy of not receiving visitors to patients until 4pm. The Ward door buzzer sounds.

Dealing With Irate People - Observer Checklist

	Strengths	Development Area
<p>1. Showing Empathy</p> <p>Actively listening (e.g. eye contact; nods; appropriate facial expression)</p> <p>Does not interrupt</p> <p>Uses appropriate noises (e.g. “I see”; “Oh dear”)</p> <p>Recognises the person’s feelings (e.g. “It must have been very upsetting for you”)</p> <p>Apologises for the situation (e.g. “I’m really sorry that this has happened”)</p>		
<p>2. Establishing the Problem</p> <p>Ask appropriate questions to get further detail</p> <p>Establishes the facts (e.g. date / time / amounts; who exactly was involved)</p> <p>Summarises and confirms (e.g. “Just so that I’ve got the facts. What you’re saying isIs that correct?”)</p>		
<p>3. Solving the Problem</p> <p>Suggests a solution</p> <p>Checks person agrees with solution</p> <p>Gives an action plan for resolution with a date/time</p> <p>Checks for agreement on action plan</p> <p>Thanks person for bringing the matter to their attention</p>		