THE HUMAN TOUCH

Personal skills for professional success

Philippa Thomas, Debra Paul and James Cadle
THE HUMAN TOUCH
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Philippa Thomas has specialised in learning and development for twenty years. With both commercial and operational experience of providing a range of IT training services to blue-chip organisations in the private and public sector, Philippa gained a unique insight into the people skills challenges arising from business change. As a director of The Celyn Group, one of the UK’s leading companies specialising in leadership, management and performance improvement, she is committed to providing her clients with creative but pragmatic solutions to such challenges. Philippa is also passionate that people skills become an integral part of professional qualifications.

Debra Paul is the Managing Director of Assist Knowledge Development, a training and consultancy company specialising in business analysis, business change and solution development. She has specialised in all aspects of business analysis and business process improvement, and also in organisational competency development. Debra jointly edited and wrote the best-selling BCS publication, Business Analysis, and is also the co-author of the BCS publication Business Analysis Techniques. Debra is a Chartered Fellow of BCS and is the BCS Chief Examiner for Business Analysis. She is a regular speaker at business seminars and is a founder member and director of the BA Manager Forum.

James Cadle has been involved in business systems improvement for over 30 years, in both the public and private sector. He is a director of Assist Knowledge Development, a specialist training and consultancy company. James has conducted a range of business improvement projects and has led teams developing and maintaining corporate IT systems. James presents training courses in business analysis, consultancy skills and project management to a variety of clients, as well as contributing to various publications, including the BCS publications Business Analysis and Business Analysis Techniques. He is a Chartered Member of BCS and a member of the Association for Project Management.
The world we live in is increasingly competitive, global in nature, and it is becoming more and more difficult to differentiate products and services to ever more demanding customers and consumers.

Not only in the future, but today, the application of technology will make the difference between success and failure. Technology continues to advance at phenomenal rates, but it is the use of this technology and its application to solving problems, developing new products, marketing and sales activities and serving customers’ needs that will differentiate companies.

Successful companies and organisations of the future will harness technology to the customer’s requirements better than anyone else. To do this requires a new combination of technological competence and people skills. For many years the IT profession has concentrated on the first of these sets of competence but increasingly it is the people skills that will make the difference.

The Human Touch focuses on all the aspects of people skills that are going to be so important in the future. These skills don’t of course just apply to the IT profession, just maybe that this skills gap within the IT profession has been more pronounced than in the past.

Most people bring technical skills of one kind another to play in serving customers, but it will increasingly be their ability to communicate, to build relationships, to work as teams, to negotiate, to lead and to influence that will result in successful partnerships that will deliver real results.

The Human Touch brings practical advice and very useful models and frameworks for all of these very important areas, and I certainly recommend it in helping people develop these really critical skills.

David Clarke MBE,
Chief Executive, BCS
Writing this book has required almost as much time spent researching our favourite guidelines and frameworks, and obtaining permission to use them, as it has crafting the written word. In the process, we have had a lot of assistance from colleagues and family. We would like to thank Matthew Flynn, Jutta Mackwell and Florence Leroy of BCS publishing for keeping us on the right track and making sure permissions were granted; our families for their support during the many hours spent thinking and writing; Charlotte Parke for providing artistic skills; Laura Whitworth for being an early proofreader and a source of encouragement; Martin Pearson from AssistKD for giving much needed clear, specific feedback; and Alan Paul for reviewing every chapter extremely thoroughly and providing so many invaluable comments.
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<th>Full Form</th>
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<td>APAC</td>
<td>Asia–Pacific</td>
</tr>
<tr>
<td>BATNA</td>
<td>best alternative to a negotiated agreement</td>
</tr>
<tr>
<td>CATWOE</td>
<td>customer(s), actor(s), transformation, Weltanschauung, owner, environment</td>
</tr>
<tr>
<td>CEO</td>
<td>chief executive officer</td>
</tr>
<tr>
<td>CF</td>
<td>completer–finisher – Belbin team role</td>
</tr>
<tr>
<td>CFO</td>
<td>chief finance officer</td>
</tr>
<tr>
<td>CIO</td>
<td>chief information officer</td>
</tr>
<tr>
<td>CIPD</td>
<td>Chartered Institute of Personnel and Development</td>
</tr>
<tr>
<td>CO</td>
<td>coordinator – Belbin team role</td>
</tr>
<tr>
<td>CXO</td>
<td>chief ‘something’ officer</td>
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<tr>
<td>E</td>
<td>extraversion – MBTI® personality category</td>
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<tr>
<td>EI</td>
<td>emotional intelligence</td>
</tr>
<tr>
<td>EQ</td>
<td>emotional quotient</td>
</tr>
<tr>
<td>F</td>
<td>feeling – MBTI® personality category</td>
</tr>
<tr>
<td>GROW</td>
<td>goal, reality, options, will</td>
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<tr>
<td>HR</td>
<td>human resource</td>
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<tr>
<td>I</td>
<td>introversion – MBTI® personality category</td>
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<tr>
<td>ILM</td>
<td>Institute of Leadership &amp; Management</td>
</tr>
<tr>
<td>IMP</td>
<td>implementer – Belbin team role</td>
</tr>
<tr>
<td>IQ</td>
<td>intelligence quotient</td>
</tr>
<tr>
<td>IT</td>
<td>information technology</td>
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<tr>
<td>J</td>
<td>judging – MBTI® personality category</td>
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<td>MBTI®</td>
<td>Myers–Briggs Type Indicator®</td>
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<tr>
<td>ME</td>
<td>monitor–evaluator – Belbin team role</td>
</tr>
<tr>
<td>Abbreviation</td>
<td>Description</td>
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<tr>
<td>N</td>
<td>intuiting – MBTI® personality category</td>
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<tr>
<td>NLP</td>
<td>neurolinguistic programming</td>
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<tr>
<td>P</td>
<td>perceiving – MBTI® personality category</td>
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<tr>
<td>PESTLE</td>
<td>political, economic, social, technological, legal and environmental</td>
</tr>
<tr>
<td>PL</td>
<td>plant – Belbin team role</td>
</tr>
<tr>
<td>POPIT™</td>
<td>people, organisation, process, information and technology</td>
</tr>
<tr>
<td>RI</td>
<td>Resource investigator – Belbin team role</td>
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<tr>
<td>S</td>
<td>sensing – MBTI® personality category</td>
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<tr>
<td>SCAMPER</td>
<td>substitute, combine, adapt, modify, put to other uses, eliminate, rearrange/reverse</td>
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<tr>
<td>SH</td>
<td>shaper – Belbin team role</td>
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<tr>
<td>SMART</td>
<td>specific, measurable, achievable, relevant, time-framed</td>
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<tr>
<td>SP</td>
<td>specialist – Belbin team role</td>
</tr>
<tr>
<td>STEER</td>
<td>spot, tailor, explain, encourage, review</td>
</tr>
<tr>
<td>T</td>
<td>thinking – MBTI® personality category</td>
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<td>TKI</td>
<td>Thomas–Kilmann conflict mode instrument</td>
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<td>TW</td>
<td>team worker – Belbin team role</td>
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<tr>
<td>UML®</td>
<td>Unified Modeling Language™</td>
</tr>
<tr>
<td>VAKOG</td>
<td>Visual, auditory, kinaesthetic, olfactory, gustatory (NLP senses)</td>
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<tr>
<td>WIIFM</td>
<td>what’s in it for me?</td>
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INTRODUCTION

Working with people can be difficult. People hold different opinions and beliefs, and they have different experiences and knowledge. They may have concerns about the future, particularly in a time of economic difficulty, and these concerns may come to the fore when changes to working practices or job roles are under consideration. As a result, anyone working in a business change role needs to be alert to their business colleagues’ beliefs and concerns. Failure to do this can result in resistance or, even worse, objections, causing unnecessary additional work or even derailing a project completely.

Business change projects bring a unique set of pressures when working with people. We may be defining business changes to be implemented, developing new processes and systems, or supporting staff to learn and perform new work practices; all of which require us to work effectively with people. Often, we are required to identify where efficiency savings can be made, which in all likelihood will involve changes that impact upon people.

Whatever our business change role, the majority of our customers are ‘internal’ (i.e. they work for the same organisation). There is often a need to negotiate funding with decision-makers or influence senior management to convince them of our worth; to bring together disparate groups and try to find consensus; to gain agreement to proposals and requirements; to convince colleagues that we have similar aims and objectives, and that we need to work together to achieve business success.

This can seem an impossible task as personal agendas come to the fore and are defended robustly, or, even worse, internal politics and hidden agendas arise resulting in passive resistance and unhelpful behaviour. Coordinating different, often competing, needs, while trying to ensure that everyone is working together to improve the business, can be extremely difficult. However, to perform our business-change roles effectively, it is essential that we are able to work successfully with a variety of people.

THE IMPORTANCE OF PEOPLE

Successful businesses strive constantly to develop and grow. Senior management decide on the strategies needed to move the organisation forward and define objectives the organisation needs to achieve. They keep a close eye on the business
environment within which they operate. They may introduce new products or services in order to capitalise on market demand and improve their quality, their customer support or any other relevant aspect of their business performance. They may launch business change initiatives aiming to achieve the twin key competencies of effective business performance and cost-efficiency.

But, to make all of this happen you need people. People who can handle difficult problems or customer complaints; people who can work with dedication and accuracy; people who can communicate clearly with a diverse group of individuals; people who can examine business intelligence information and find trends, opportunities and insights; people who can manage other people.

We often hear the phrases ‘our people are our key resource’ or ‘our staff are the secret of our success’, but sometimes we suspect these are empty words, spoken without any sense of real meaning behind them. However, in successful organisations, there is a strong basis for these phrases. We could also add to them:

- People have different priorities and concerns.
- People value different things.
- Senior managers are people.
- Our customers are also people.

**CATEGORISING PEOPLE**

Somewhere, over the last couple of decades, we seem to have lost our focus on the individual. The introduction of categories such as customers, suppliers, managers, regulators and, the favourite in the business change world, ‘end-users’, or worse, just ‘users’, has removed us quite a way from thinking about the individuals within these groups. We might consider their needs and values, but often for the group as a whole. Along the way we have lost the sense of the individual. This seems an obvious statement, but recently, perhaps in the last couple of decades, we have stopped talking about ‘people’ to an even greater extent. We have deployed a new term, a ‘catch-all’, so that rather than talking about people as individuals, whether managers or customers, we are now concerned with a new super group, ‘stakeholders’.

Stakeholders are suddenly everywhere. Rather than engaging with ‘people’, we engage, analyse and manage ‘stakeholders’. And there are so many of them. Look at any document, such as a business case, project brief or requirements document, and the list of stakeholders can be endless. The stakeholder wheel, shown in Figure 1.1, provides eight categories of stakeholder and each category can represent numerous individuals.

When reading or reviewing documents, it sometimes feels like anyone who might possibly be interested has to be included in the stakeholder list, but whether this results in real engagement with the people involved or if their comments are really required is often questionable. The involvement of so many people may be important,
although that can be a moot point in today’s agile business world, but there is also the danger that this is merely paying lip service: a pretence of working with the stakeholders when in reality the numbers involved make this impossible.

People required to represent their group or function may have an individual perspective that is not shared by their colleagues or, perhaps, by only some of them. In practice, inviting such a range of people to participate means that we are treating this as a box-ticking exercise. And, there is more than a suspicion that the rationale for involving everyone possible is to ensure that we can cover ourselves, or justify our decisions, if anything goes wrong.

**THE SENSE OF THE INDIVIDUAL**

So, while the term ‘stakeholder’ is intended to give us a sense of people having an interest or ‘stake’ in the situation, the broad, open nature of the term, and the ubiquity of its use, has resulted in a diminished sense of the individual. We can easily forget, or ignore, that behind every identified ‘stakeholder’ is a person with a world view based upon strongly held values, life experiences and personal needs. While some of these may be highly positive world views, that offer insights and support to projects, others may have the potential to delay, disrupt or even derail the work. Hidden agendas can flourish if no one takes the time to look for them.
When working with people, or stakeholders, it is vital that we consider the individuals involved in the situation. We must understand the distinction between a stakeholder group, where we may need to adopt a broad brush level of understanding, and individual stakeholders where it is extremely important that we understand the need to connect with them on a personal level. To do this effectively, we need to develop keen behavioural skills that can be adapted to the needs of the individual.

THE NATURE OF BUSINESS CHANGE WORK

The customers
The majority of business change professionals need to engage with a wide range of people. Our ‘customers’ can include shareholders (or other forms of owner if this is not a commercial concern), managers, suppliers, regulators, business partners, internal purchasers and consumers. The list is very long and, noticeably, many types of customer are internal to the organisation.

This means that the nature of the relationship with those customers can be very different to the relationship where the customer is external. It will not be sufficient to declare that a change cannot be accommodated, a service not provided or a product not available. The customer supplies the funding to develop or procure the service and, rather than asking or enquiring, they may require it to be made available, which can bring many additional problems, if not outright conflicts. Our internal customers include those who have set the mission, objectives and strategy for the organisation and are looking to us to help achieve them. They also include the people who will ensure the successful deployment of the solutions we deliver. We provide the detailed systems and processes that are deployed to execute the strategy, enabling delivery of the organisation’s products and services to the external customers. Non-delivery is not usually an option.

The engagements
The nature of the engagements can also vary widely. We may be required to engage at an early stage in the business change life cycle to evaluate what can be done in a particular situation to improve the business. On the other hand, we may need to deliver a service or product that will require the business staff to change their procedures and practices or assimilate new information. We may be required to consider whether the business staff meet the needs of the organisation and ask questions such as ‘are fewer staff required for the new ways of working?’

Sometimes our work may provoke the need to challenge and convince people of an alternative course of action; sometimes it may need us to handle situations with empathy and care. These different situations have one thing in common: they all involve people and, as a result, will require an assortment of behavioural skills if they are to be handled well.

CATEGORIES OF SKILL

Working with colleagues, particularly when they are also customers, requires an extensive array of skills. We have to deal with a variety of business situations where the issues may be poorly defined and symptoms mistaken for fundamental
problems. We have to manage customer expectations and handle the pressures arising from them. We have to be persuasive and influential when offering advice or explaining ideas and options.

Given that these skills are so wide-ranging, it is helpful to organise them into the three categories shown in Figure 1.2: technical skills, business skills and behavioural skills.

**Figure 1.2  Three categories of skill requirements**

Firstly, we need to have the specialist technical skills relevant to our particular discipline and we need to keep up with the latest developments. Technical skills alone are insufficient for today’s business world, so, next, we have to have ‘commercial awareness’: an understanding of the business issues relevant to our organisation and the ability to align our work with the requirements of the business domain. Finally, it is vital that we are able to deploy a range of behavioural skills in order to work effectively with our customers and colleagues. We need to use our skills from all three areas to ‘deliver’ the solutions and meet the needs of the customers who determine our budgets and allocate our funding.

The requirement for IT professionals to have skills in the business and behavioural areas, in addition to their technical skills, is explained in the white paper *The State of the IT Market 2011* (Modis, 2011) as follows:

> ‘As IT moves from being a pure delivery function to a change management and transformational one the expectations around soft skills and commercial focus have also led to a sea change about what makes a good IT professional.’
The importance of soft skills was also highlighted by Pearson and Woodman (2011) in a report for the Chartered Management Institute in which managers from across the business spectrum identified coaching and mentoring (36 per cent) and negotiating and influencing (34 per cent) as key priorities for their personal development in 2012.

**THE HUMAN TOUCH**

While comprehensive business texts abound and technical skills reference books are widely available, we have often found that this is less the case with behavioural skills; each reference text focuses on an individual topic. You will find books that discuss communicating or influencing or presenting but, to work in a professional capacity, we don’t need just one of these skills: we need all of them, and researching all of the books is time-consuming. Further, we have often found that the most useful information in any behavioural skills book is usually found in the few first chapters or needs to be filtered out from the lengthy descriptions.

For these reasons, the idea was born to develop this book to provide a holistic view of personal skills and to bring together the frameworks and techniques covering the range of behavioural skills that are so vital for professional success. We have referenced the behavioural skills books and articles that we have found useful. We have also added our own experiences to expand upon some of the frameworks and techniques and also to provide practical guidance in their use.

We may need to build rapport with internal or external customers (Chapter 2). There may be internal politics or other commercial factors at play (Chapter 9) and perhaps they will require careful negotiation (Chapter 4) or influencing (Chapter 6). It may be vital to show leadership (Chapter 5) or manage expectations (Chapter 11). Clear, confident presentations (Chapter 8) or persuasive reports (Chapter 7) may be needed to convince senior management to take action. We may need to work with our colleagues to build effective teams (Chapter 3) or support colleagues through coaching and mentoring (Chapter 10). Business problems may need creative solutions (Chapter 13) developed through effective facilitation (Chapter 12). Whichever it is, a business professional has to deploy all of the relevant behavioural skills in order to succeed.

The book reflects the importance of developing professional relationships built on mutual respect and trust. Given that the skills discussed in this book are behavioural in nature, some people will find that they apply them naturally and with ease, while others will struggle to succeed. However, we believe that these skills are vital if we are to work effectively within organisations. Everyone, no matter how talented, can improve.

**CONCLUSION**

Anyone working in business will encounter, over time, many different personalities and situations, each of which will need to be handled with care. People, whether they’re customers, senior executives, suppliers or colleagues can
sometimes behave in inexplicable and seemingly illogical ways. As a professional you have a choice to make. You can dismiss their behaviour as ridiculous, ignore it or react negatively to it, then get frustrated that your initiative isn’t moving forward, strapping yourself firmly to the wheel of blame. Alternatively, you can make an attempt to understand where they’re coming from, accept that you need to adapt your own behaviour to align with the needs of others and begin to move things forward.

There are some excellent frameworks, techniques and models that can provide helpful insights into our behaviour and that of our colleagues and customers. These can enable us to develop strategies to cope with business complexity and personal diversity, and thus achieve successful outcomes.

The ‘human touch’ means having the humility to accept that our own behaviour has a part to play in many of the people issues we encounter; then having the courage to do something about it.

This book has been written to bring together the frameworks and models that we have found most beneficial. During our business careers, working with people across a range of business situations, we have used them to resolve problems and improve performance. We feel they have much to offer in helping us deal with the complex situations that arise when working with people. We hope you find them useful too.

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Philippa Thomas, Debra Paul, James Cadle

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