

## Understand Your World: Learn to Deal with Personalities

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### Importance

- Building and advancing business relationships is widely believed to be very important:
  - 88% of business executives view the strength of their business relationships as the main reason behind their goal achievement.
  - 70% of business leaders believe relationship skills are critical to leadership success.
  - 97% of executives believe that leaders in their organizations need to be able to collaborate.



*Center for Creative Leadership*

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### Relationship Building in Records Management

- You can't do it all yourself; you must rely on others.
- You can't know it all yourself; you must collaborate with experts in various areas.
- If your colleagues care about you and value your relationship, they're more likely to perform for you.
- If others don't do it right, you'll likely take the heat!



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## Today's Presentation

- Not logistical
  - Not focused on how to be most effective with the *data* of your business.
  - See ARMA website.
- Relational
  - Focused on how to be most effective with your most important asset: your *colleagues*.
  - Maximizing effectiveness with colleagues = maximizing effectiveness as records managers.
  - Capitalizing on the strengths of your personality type.
  - Structured 5-step process.



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## Capitalizing on the Strength of your Personality Type

- My assumptions
  - Introverts
    - Internally oriented people
    - Comfortable working alone
    - Careful with details
    - Less comfortable with social interaction, especially get-to-know-you exchanges.
  - Preferred working style
    - Rules and order
    - Routine and structure
    - Logical progressions.



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## Why Introverts Can Make the Best Leaders

(Kahnweiler, 2009)

- They think first, talk later
- They focus on depth
- They exude calm
- They let their fingers do the talking
- They embrace solitude



Forbes Magazine

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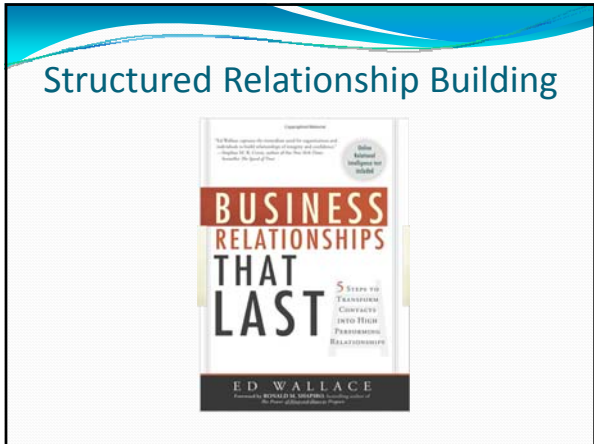
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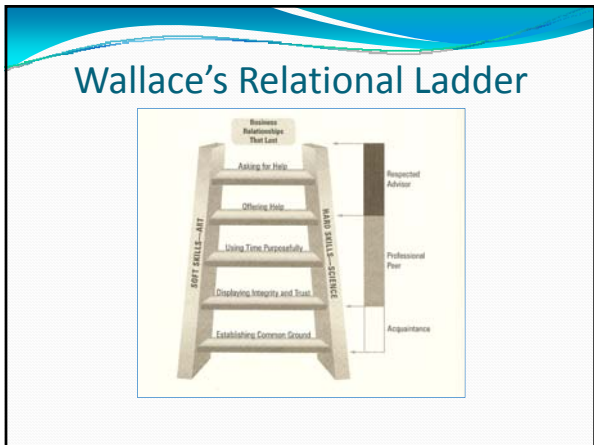
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### Step 1: Establishing Common Ground

- “Valley of the acquaintances” (15%)
- Majority of colleagues in your organization
- Set up an initial meeting to launch the relationship
  - Goals of the initial meeting:
    1. Establish common ground
    2. Learn about the business opportunity

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## “ROC” Your Initial Meeting

- Building **R**apport
- Sharing the Meeting **O**bjectives
- Developing **C**redibility



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## Building Rapport

- 2 schools of thought:
  - Gather information and/or comment on office props and work setting:
    - Calendars & desktop items
    - Photos & frames
    - Plants/flowers
    - Office layout
  - Sit back and let your colleague set the tone:
    - If small talk, expand with neutral topics
    - If straight to business, follow them there
      - Don't push a connection that isn't reciprocated
    - Avoid commenting on office props because you don't know the backstory



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## Sharing the Meeting Objectives

- Use exploratory, non-threatening words:
  - “Learn” or “discuss”
- Prepare specific topic areas to learn about or discuss
  - Introduce yourself and records management department
  - Get to know more about colleague's system
  - Spend time discussing current project or issue
  - Generate next steps together
- Share your value statement



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## Value Statement

- Short, consistent summary about how you and the services of your office help colleagues.



- "We strive to help our colleagues maximize efficiency and minimize risk while ensuring compliance with appropriate ethical standards and state laws."

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## Developing Credibility

- Do your homework
- Ask open-ended questions
- Sincere inquiry
  - Conversational tone
  - Demonstrate interest
  - Convey sincerity and competence
- Don't give a "presentation," build the relationship
- Resist the urge to offer solutions



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## Step 2: Displaying Integrity & Trust

- Move from "acquaintance" to "professional peer" (75%)
- Colleague may need to share weaknesses and liabilities
  - Requires trust and belief in your integrity
- Keep commitments
  - Demonstrate that you have done so with evidence
- Go "ugly" as early as possible



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### Step 3: Using Time Purposefully

- Respect everyone's time enough to spend 10 minutes planning meetings ahead of time
- Prepare meetings that "POP"
  - Purpose
  - Outcomes
  - Process



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### Purpose of Meeting

- What am I trying to accomplish?
- Why will the participants benefit?
- Do I have the right attendees?
- Do I need more or less time?
- Do I even need to call this meeting?



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### Outcomes of Meeting

- What will each person leave the meeting with?
- Keep the purpose in mind



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## Process of Meeting

- Specific steps to follow to achieve purpose and outcomes
- Consider adding duration timelines for each section



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## Step 4: Offering Help

- Advance from “professional peer” to “respected advisor” (10%)
- Notice the cues
  - Seeking unrelated advice
  - Inclusion in planning processes
- Exercise empathy
  - Imagine being in your colleague’s shoes:
    - What are his/her goals, passions, and struggles?
    - What kinds of things is he/she asking your opinion about?
  - Offer to help in those areas
  - Consider stepping back on your own goals if needed



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## Step 5: Asking for Help

- Set up a collaborative dynamic
- Allow yourself to be vulnerable
  - “I don’t know”
  - Acknowledge limits in areas of effectiveness, influence
- Ask for a referral or recommendation to get “in the door” with another colleague
- **...and the relationship-building cycle begins again**



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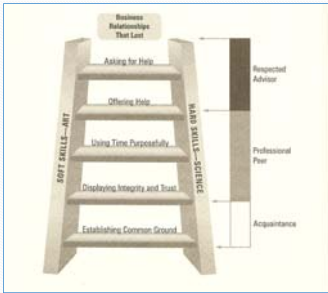
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## Wallace's Relational Ladder



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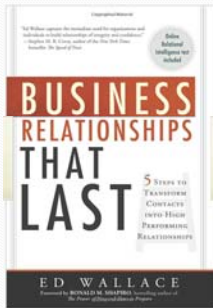
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## Book Reference:



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