



## Work Area 3 Communication and social, telephone handling, code of conduct, equal opportunities and relations

### 2.7 RECALL AND APPLY KEY PRINCIPLES OF GOOD RELATIONSHIPS WITH CUSTOMERS, EXTERNAL STAKEHOLDERS AND COLLEAGUES IN A CLEAR AND EFFECTIVE WAY

- LO010: Demonstrate the ability to recall the key principles of data protection, security and confidentiality within the workplace and in the business environment and apply these principles effectively and efficiently.
- LO011: Demonstrate the ability to recall the key principles of good relationships with customers and other external stakeholders, demonstrate competence in applying these principles in a clear and effective way. Be able to perform Public Relations activities to improve workplace relations, for example acknowledging birthdays, name days and other special occasions
- LO012: Demonstrate the ability to recall the key principles of good working relationships within the organisation and demonstrate competence in applying these principles in a clear and effective way within the organisation. Be able to perform Public Relations activities to improve workplace relations, for example acknowledging birthdays, name days and other special occasions.



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# Module Details

Work Area Code:	3
Work area title:	Communication and social, telephone handling, code of conduct, equal opportunities and relations
Unit Code:	2.7
Unit Title:	RECALL AND APPLY KEY PRINCIPLES OF GOOD RELATIONSHIPS WITH CUSTOMERS, EXTERNAL STAKEHOLDERS AND COLLEAGUES IN A CLEAR AND EFFECTIVE WAY
Learning Outcomes Nos:	LO010, LO011, LO012
Learning Outcomes titles:	<ul style="list-style-type: none"><li>• Demonstrate the ability to recall the key principles of data protection, security and confidentiality within the workplace and in the business environment and apply these principles effectively and efficiently.</li><li>• Demonstrate the ability to recall the key principles of good relationships with customers and other external stakeholders, demonstrate competence in applying these principles in a clear and effective way. Be able to perform Public Relations activities to improve workplace relations, for example acknowledging birthdays, name days and other special occasions.</li><li>• Demonstrate the ability to recall the key principles of good working relationships within the organisation and demonstrate competence in applying these principles in a clear and effective way within the organisation. Be able to perform Public Relations activities to improve workplace relations, for example acknowledging birthdays, name days and other special occasions.</li></ul>
Recommended Duration:	4 hours
Trainer:	



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- **Definition**
  - Keeping client and business information private
  - Treating all the information you come across as confidential
  - What you see and hear in the workplace stays at work. No information can be told to anyone outside the workplace
  - Accessing files only if given permission. No confidential material or files can leave a business.
  - Not discussing business dealings outside the place of work.
- **Legal action may be taken against a person or organisation that reveals client and business information.**

- *Health Records*
- *Information Privacy*
- *Privacy*



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A police officer arrives at your office and informs you that he is looking for a person, and that he has an outstanding warrant to arrest this person. He asks you whether this person is an employee of your organisation/ company and, if so, whether he could have the employee's address in order to execute the warrant.

## • Questions

1. Are you obliged to inform the police officer whether this person is an employee of your company?
2. Should you inform the police on the address?



# Group discussion



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- **Possible answer:**

- Strictly speaking the short answer is no, unless the police have a search warrant or subpoena.
  - At common law no citizen has an obligation or legal duty to assist the police in criminal investigations (but they are guilty of an offence of hindering or obstructing if they do something deliberate or positive to prevent the investigation, or if they fail to advise the police of a serious indictable offence, if they have received some benefit from the offender for failing to advise)
- But it is not something you should be dealing with at level 2. Just call your supervisor.

- **Case study (Part A)**

- A man visits your office and asks for a woman who no longer works for your company. You inform him that she is no longer works for this company.
- The man tells you that he is an old friend from abroad and he wants to surprise her. He is asking for her address.



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- Questions

1. How do you deal with this matter?
  1. You write down your ex-worker address. After all she will be so pleased to see an old friend. She was not in the best mood recently.
  2. You deny to give the address.
  3. You ask him to give you *his* phone number. You need to ask the woman for permission in order to disclose such information.



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- If you did not give the information

## WELL DONE

- The person is an ex-boyfriend and your ex-coworker does not want to have any contact with him.



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# Methodological tool



## Shield and protection

EUPANEXT\_LO\_010\_M\_001



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- So...
  - Why is confidentiality important?
    - Because there are **personal information** that must not be shared, such as medical issues, personal issues (eg. divorce) which cause discomfort when discussed. **The employer as well as the co-workers should respect this.**



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- The personal assistant will often come across confidential information
  - Related to the rest of the employees
  - Related to the manager himself/ herself
- To be on the safe side
  - You should NEVER disclose any information to anybody unless it is absolutely necessary for your work or their work.
  - If you are not sure JUST ASK!



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- Make sure that confidential information is effectively protected against improper disclosure when it is disposed of, stored, transmitted or received
- If you disclose confidential information you should release only as much information as is necessary for the purpose
- You must make sure that other people to whom you disclose information understand that it is given to them in confidence which they must respect



EXAMPLE  
FOLLOWS



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# Methodological tool

## Case study: Confidentiality Principles

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- **Stakeholders**

- Are people who have a vested interest in the company.

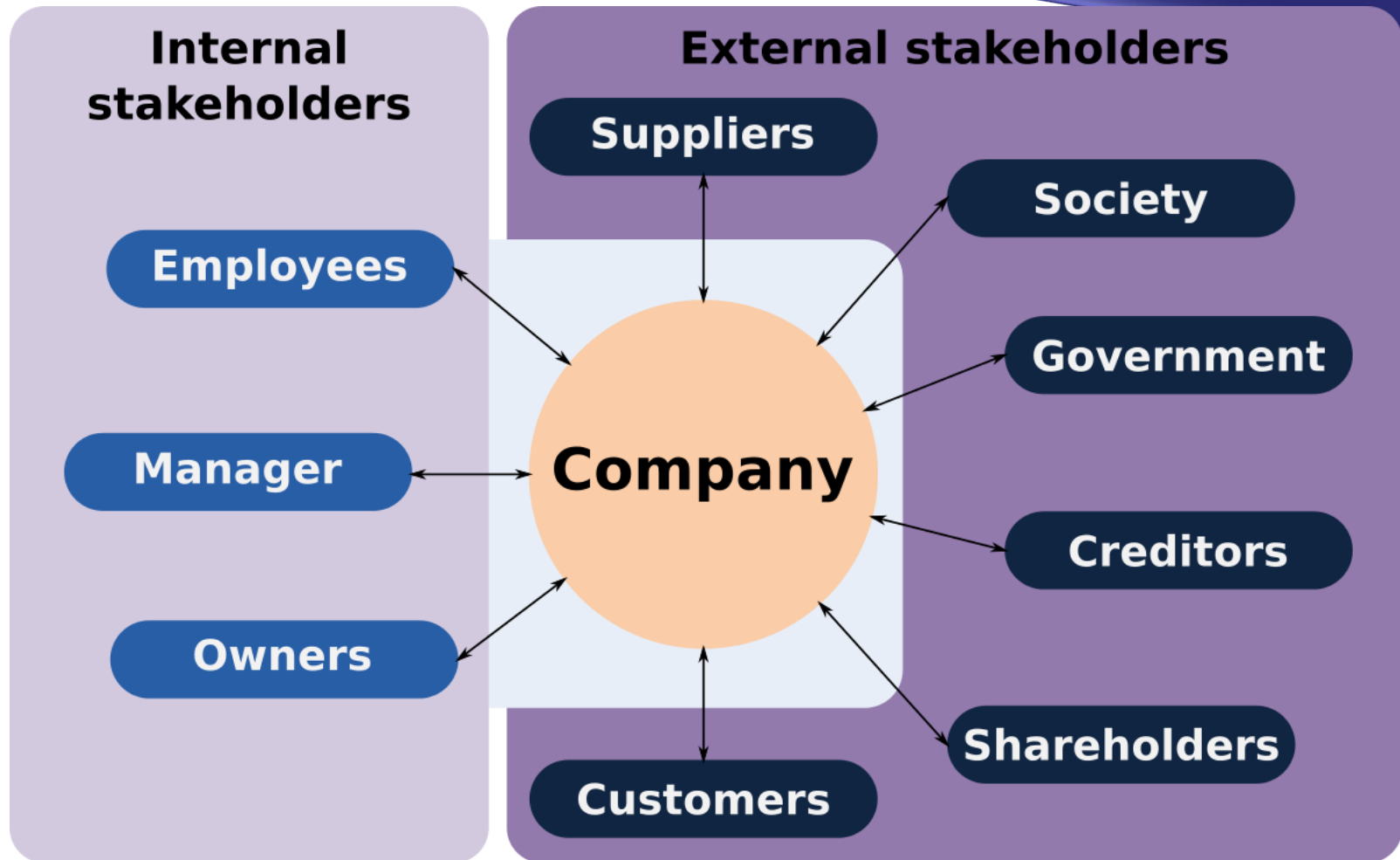


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# Internal and external stakeholders



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- **Internal stakeholders include the employees, managers, owners/ shareholders.** They are all effected by wages and job stability as well as other benefits. Managers may get bonuses, so they want the business to be successful. The owners/ shareholders want the best for the company so that they gain more money.



- **External Stakeholders** include customers, suppliers, the Government. They are involved with the company but not employed directly by the company. Customers are interested in prices and quality of the product. Suppliers are interested in the success and stability of the company so they can ensure they will have customers in the future. The Government is interested because companies (especially large ones) pay taxes and have to comply with the law when employing people.



# Exercise: Identify three important customers - stakeholders

- “Hi Sheila! Can you book me a flight ticket for Paris this Saturday morning”?
- “Mr. Duchovny your credit balance is out of date”.
- **Mary, can we sent flowers today to all people named Andrew in the office?**



Travel Agent



Banker



Florist



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# Importance and benefits of positive relationships

- Improved Teamwork
- Improved Employee Morale
- Retention
- Increased Productivity



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## 1. Acceptance

- *Accept people for who they are*
- *All people are unique and this is a good thing*



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## 2. Respect

- *Treat all people with respect*
- *Do not manipulate others*
- *Respect others' right to be who and what they are and do not try to change them*



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## 3. Understanding

- *Have a clear understanding of yourself and others*
- *Try to appreciate and understand the differences that make each individual unique and special*



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## 4. Transparency

- *Be open and honest*
- *Allow and encourage others to be themselves*
- *Promote a feeling of openness*
- *Do not permit predisposition, prejudgment or prejudices to stand in the way of open and harmonious relationships.*



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## 5. Non-judgment

- *Do not judge*
- *Accept and practice the belief that we are all different and unique*
- *Approach others with the attitude that there are more dimensions to a given situation than simply "right" or "wrong."*
- *Expect and embrace these differences of perception as opportunities to learn*



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## 6. Empowerment

- *Be self-empowered*
- *Do not seek external strokes to determine your feelings or attitude*
- *Empower all those with whom you come into contact, respecting their individuality and encouraging their input.*
- *Be willing to admit I do not have all the answers.*



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## 7. Trust

- *Operate from a fundamental basis of honesty*
- *Be honest with others*
- *Proactively promote an environment which invites open discussion, differing points of view*
- *Maintain confidentiality when others confide in me*



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# Understand the relationships with customers and other internal stakeholders

- Having a friendly image and good relationships at work was the answer to one of the twelve key questions that predicted job satisfaction.
- In this case:
  - **PR** Activities
    - Remember birthdays, name days, etc.
  - Meet co-workers **personally** outside work
  - Keep **in touch**
  - Be **friendly**
  - Show **sincere interest** (e.g. you know that one of your co-worker's child was ill - ask about his/her health), but be discrete



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# How to maintain relationships with key stakeholders



Don't worry, we've been assured that this mystery will be solved in time for our  
**Holiday Office Party**

We're leaving the investigation to those who do it best  
Let's get away all those computers, papers and mess  
and come to our office party in your best suit or dress

Come join us and Toast the Season

Thursday, December 5th  
5:00 p.m.

The Columbia House - Penthouse Floor  
485 Jefferson Plaza

Leonard, Barley, Travis, Bailey and Smith

Regrets only  
to Dianne 248-8522

It would be a crime to miss our party  
or not be on time



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- Employee behaviour is defined as an employee's reaction to a particular situation at workplace
- Employees need to behave sensibly at workplace to:
  - Gain appreciation and respect from others
  - Maintain a healthy work culture
  - Never shout on fellow workers
  - Spread rumours
  - Criticize your Boss
  - Be polite and speak softly
  - Remember that you are not the only one working

# Positive Organisational Behavior at work

- Building positive workplace relationships is vital for career success.
- Relationships can positively or negatively affect your satisfaction with the job, your ability to advance and gain recognition for your achievements.
  - When you build positive relationships, you feel more **comfortable with your interactions and less intimidated by others**. You feel a closer bond to the people you spend the majority of your working-time with.



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- Need for positive working relationships
  - More productive
  - Better psychology
  - More customer oriented



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**Good behavior**



**better working environment  
higher client orientation**



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# Remember Name Days, Birthdays and special dates:

- What do employees think about it?

- Michael:

- It is best not to start the birthday celebration thing. My boss is right. If he wants to recognise their work or contribution, he can do it by giving them a bonus at the end of the year.

- Peter:

- I think that it is a good thing. It makes you feel important and a part of the team. My manager always gets us a card and a small present (chocolate usually). I think it is lovely and I feel appreciated.



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# A written apology is sometimes needed

- Especially in the case of:
  - Customer complaint
  - Disagreement with a supplier

*a written apology*



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# All communication methods are possible

- **Although,**
  - Written communication is considered to be more formal than verbal
    - But an email is less formal than corporate letters, etc.
- **Formal language is required**
  - Slang is not acceptable
  - Attention to plural and singular



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Dear Mr. Stevenson,

I would like to sincerely apologize for posting some fake Lego ads that aroused a series of anxiety and disgust on internet. I did not realise that the ads I had received through email were spam.

My apologies to the respected brand of Lego.

*Yours sincerely,  
Tate Philips*



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# How effective are you in applying all of these?

Try to get feedback from the internal and external customers, regarding your PR activities. Did they enjoy the party (*you will realize that they did not enjoy it if they do not come next year*).

Try to continuously improve the quality your daily work.



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Create a poster (flipchart) that will present the key techniques for building successful relationships with internal and external stakeholders



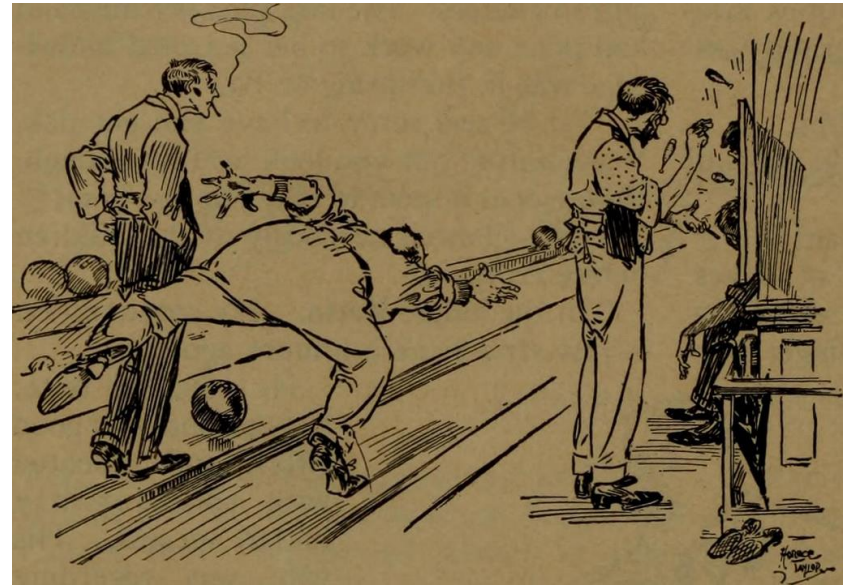
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# PR activities promoting relationships with internal stakeholders

- Outings
- Parties
- Invite their families
- Events
- Lunches
- Dinners
- Team sports



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# PR activities promoting relationships with external stakeholders, pt. 1: planning

- Define the audience: List the key stakeholders
- Define the requirements: "What do they want to know?"
- Build a communications schedule: Flexible yet consistent
- Define the medium of communication An appropriate medium should be selected to ensure the information is delivered successfully.
- Prepare the content



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# PR activities promoting relationships with external stakeholders, pt. 2: implementing

- PR research

- Tools:
  - Surveys
    - Phone
    - Mail
    - Face to face interviews
  - Focus groups
  - Database analysis



**WE NEED TO UNDERSTAND  
THEIR NEEDS FIRST!**



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# PR activities promoting relationships with external stakeholders, pt. 2: implementing

- Direct mail or online informational output
- Social activities
  - E.g. Outings, parties, dinners/lunches, events
  - Christmas cards, birthday/nameday wishes, etc.
- Newsletters
- Charity/Corporate social responsibility



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# Communication within the organisation

- **Oral communications**
  - Telephone
  - Speaking directly to an employee
- **Face-to-face communications**
  - Visiting the office by arrangement (timesaving)
  - Team briefings
  - Meetings
  - Presentations.



# Communication within the organisation

- **Online communications**
  - internal e-mails
  - This is a cheap, quick and efficient means of communication.
- **Written communications**
  - Internal memos, staff magazines, notices or posters on staff notice boards.



# Methodological tool

Identify different types of stakeholders. Maintain good relationships with different types of stakeholders.

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# Methodological tool

## Positive organisational behaviour

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# Questions

- List examples where principles of confidentiality should be taken into consideration.
- Explain why confidentiality is important. Identify external stakeholders in an organisation.
- Describe how to treat other people in a way that respects their abilities, background, values, customs and beliefs.
- Define the key principles that you follow in order to build good working relationships within the organisation.
- List several PR activities and describe how they can promote effective relationships within the organisation.





- **Confidentiality**
  - Keeping client and business information private
  - Treating all the information you come across as confidential
  - What you see and hear in the workplace stays at work. No information can be told to anyone outside the workplace
  - Accessing files only if given permission. No confidential material or files can leave a business.
  - Not discussing business dealings outside the place of work
- **Key principle of good working relationships**
  - Acceptance
  - Respect
  - Understanding
  - Transparency
  - Non-judgment
  - Empowerment
  - Trust





# Well Done!

# You have completed this unit



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