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Managing People: Set Expectations and Boundaries

It wasn't until I was in full swing in business when I realized how people-oriented I needed to be to serve my clients. I understood that I would be responding to an excessive amount of emails, service calls, report writing and doing what I like to do – making sure the money is good by finding/correcting accounting errors, analyzing the fund accounts and balancing the books; and I was. I do that and have to be at the ready to say 'Hi' to office guests, chit chat with directors and have impromptu meetings with trades and/or groups with grievances – all face to face, or over the phone.

One recent term I heard was "managing expectations" and if there is one thing I struggle with it's vague,

trendy terms that have variable meaning. I had no idea what this meant until I started having face-to-face chats with owners, boards and contractors. I realized that I wasn't fitting inside "their box" and meeting their expectations, or for that matter mine, and it made relations very difficult. I am a thinker, and responding 'in the moment' is not always easy for me when things are not straightforward. I had to learn to ask the question, "What do you want from me?" and determine at the moment if I could provide that for them – and how. Being in this industry where the ground already shifts under my feet now had me acting like Indiana Jones in the 'Temple of Doom', jump-

ing from one expectation to the other, constantly shifting my weight to accommodate the next issue standing between me and 5 p.m. But I press on; I learn to adapt or die.

Customer Service First

The greatest reminder was I am still in the customer service industry even though what I was offering was no longer a cool drink or a hot Joe and, while I wasn't earning tips, I still had to impart a positive memory for my clients, and hope they would come back to show me support when needed. I had to remember that I was once again offering a customer service 'experience' and it was in the moment – not

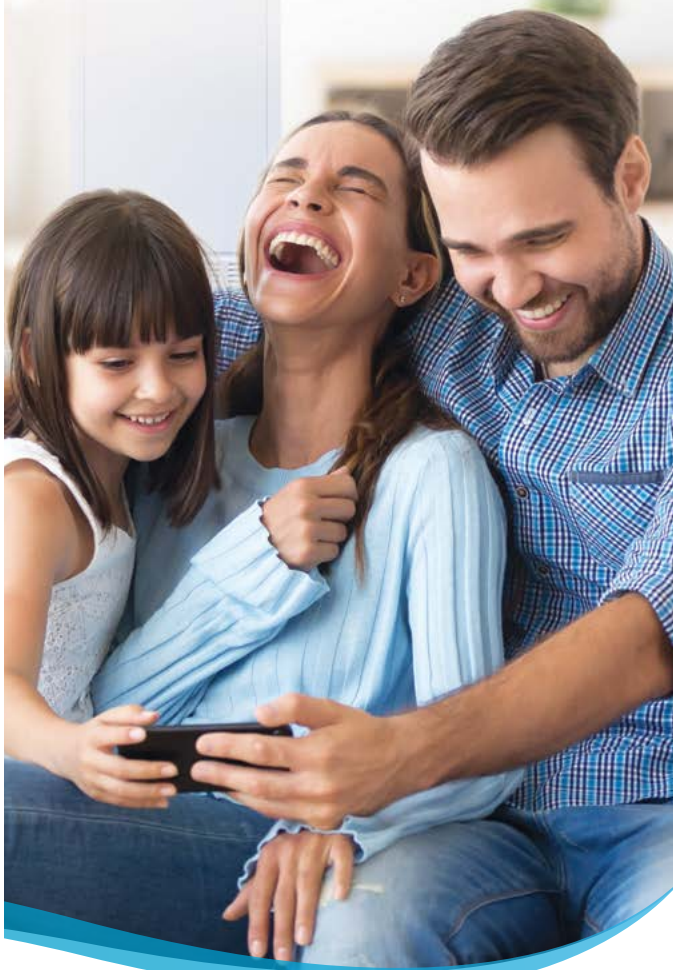




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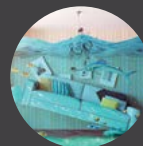
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pre-prepared like a PowerPoint presentation – I was the PowerPoint live and in colour!

I realized I wasn't offering a product, but solidifying the idea that all is well (despite what it looked like, I was offering assurance, security and peace of mind). On top of that, I had to walk the fine line of educating both sides of the equation and explain that I work for the corporation not just the board or the owners. At a board meeting, I was advocating for the owners via the documents and my knowledge of them, and with the owners, I advocate for the board and their dedication to the corporation, at the same time helping both sides understand that I work for neither but for the best interests of all.

Show Some Love

The first revelation I had was that each group is an owner and this is their home, investment or business. For owners, it was realizing the building or house is not a rental; their lives are invested in this community and they are not as in control over the day to day as they used to be. They care about what is going on

around them and are good stewards of what is theirs. They want to know that we managers care, too, and each owner has their own idea of what that looks like. Learning to listen is number one. I have learned to open my ears to certain phrases owners and contractors use to express their ideas and concerns. This helps me to respond so that they hear what I am saying. For example, an owner may start by saying, "I feel, I think or I see" and I will respond using the same 'I' statements, so that what I am communicating is heard by them, using their language. This helps to prevent repetition when they feel they are not being heard the first time, and I close out the conversation by restating the problem and reaffirming the actions that will be taken. Apologize or be thankful, I know this sounds very Canadian, but are they the apologetic or helpful type? Sometimes they just need to hear it. We know it's not our fault, but who else is going to say it? Sorry to hear that your roof has a leak. And over Christmas – yuk! Thanks for bringing that to our attention. Sorry, that owner tore a strip off you – I agree that had to be uncomfortable.

The agreement is monumental in helping to identify their state of being and showing empathy.

Set Boundaries

I try to imagine if this was my business or home and therefore my problem. It is ok for owners to be angry, frustrated, concerned or too helpful – how they express it is another matter to be managed by having boundaries. Some folks feel secure knowing there are boundaries and will test them to see where they stand; once they do their tune can change and they will learn to function within the boundaries. Do you know what your boundaries are? Have them, keep them and be clear about them. Know and have boundaries from work hours and lunchtimes to office harassment policies and laying out the rules of the corporation or the Act – sometimes it's simply first-time ignorance that can be fixed with knowledge.

Know yourself. Know where your personal boundaries are. Do you need time to respond properly if you feel overwhelmed, frustrated or do not know the answer? It's ok. Make time, confirm you will investigate and get back to them and put the issue in priority – just remember to circle back and deal with it! Do you need someone else to run interference? Ask for help. Be honest if you do not know the answer. The bottom line is the client needs understanding, direction or an answer and it doesn't always have to come from you. Most of us work in teams and for good reason. So, take the time to back off when needed and use that time to learn how to do what others do best or naturally; and tell yourself that you get better every time so one day you will be running the interference for others. ■

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