

As stressful as terminations can be,
there are ways to conduct these
processes sensitively and with dignity.

Separation Guide for Managers

ALCHEMY
CAREER MANAGEMENT

Introduction

ALCHEMY Career Management has produced this guide to outline and clarify appropriate separation procedures that will help maximise effectiveness and minimise costs to both the organisation and the individual. It covers appropriate processes to follow from the time a decision is made that a position is to be made redundant, to the day the individual leaves the company and beyond.

Our Shared Objectives

Separations are difficult but experience shows that doing them effectively meets the following objectives:

- Maintains self-esteem of the impacted individual
- Acceptance of the message and reasons for it
- Allows the individual to move on as smoothly and constructively as possible
- Reduces litigation risk
- Demonstrates the right treatment of people to individuals both inside and outside the organisation
- Minimises the negative impact of change on remaining staff and teams.

Manager Responsibilities

The separation meeting is the responsibility of the manager to whom the staff member reports. As a manager, you are responsible for the well-being of the staff member facing separation and the well-being of those remaining behind. There are a few fundamental guidelines that will help you meet these responsibilities.

- Communicate in a professional, business-like manner
- Remain calm and composed, regardless of the behaviour or reaction you face
- Respect the dignity of the individual
- Follow the prepared process and script

Don't be a counsellor or give advice. Stick to the facts and the steps in this guide.

Covered in this Guide

- | | |
|---------|---------------------------|
| PART A) | Preparing for the Meeting |
| PART B) | Conducting the Meeting |
| PART C) | After the Meeting |

Please note however, that the material in this guide is not exhaustive. It provides specific assistance for managers conducting separation discussions. Specialist assistance with the legal and taxation issues that surround separation may be required in some circumstances.

This guide focuses on separation due to organisational change and role redundancy. It does not specifically cover separations owing to poor performance.

PART A

Preparing for the Meeting

Preparation is the key to conducting a professional meeting and remaining in control.

Here are the steps to follow.

STEP 1) Get Professional Advice.

Contact your Human Resources representative prior to taking action. In addition, your ALCHEMY Coach can assist you from the outset in planning the separation.

STEP 2) Confirm the Details.

Confirm all employment details and entitlements. The following needs to be considered:

- a. Severance Package Details: Including long service leave, payment in-lieu, unclaimed expenses, superannuation and life insurance.
- b. Returning Company Property: Credit cards, security passes, ID, laptops, phones, files at home, company information/books/manuals, car, car keys.
- c. Removing Personal Property: On desks, in lockers or in kitchens.

Document the termination details and check with your HR Department to ensure the correct legal and company policy requirements have been met. Clearly documenting the reasons for separation is also a personal safeguard for you as a Manager as it provides clarity and objectivity. It is also additional protection should litigation eventuate.

STEP 3) Meeting Room Set up

If the meeting is taking place in the office, ensure a quiet and private room. Ideally, the room will be neutral (i.e. not your office or their office) and away from the open office environment. If the meeting is being conducted at an alternate venue, confirm the details and its suitability.

Ensure you have comfortable seating and have tissues and water on hand. Talk to your ALCHEMY Career Coach about meeting logistics.

STEP 4) Confirm the Timetable

Avoid conducting the discussion on Monday mornings, Friday afternoons or before holidays. Ideally, the meeting will be held early in the week to give the individual time to start the next steps and have a direction by the weekend.

If multiple meets are being scheduled on a given day, aim for a short meeting but plan extra time to ensure each individual feels they have been fairly dealt with. Use 30min time slots as a guide which will give time to answer questions and time for yourself between meetings.

If there are a number of discussions, don't rush them through. Allow time between each one and treat each discussion separately. Also allow yourself time to recover.

STEP 5) Write your Script

A clearly defined script ensures that all of the critical information is presented and makes it easier to deliver it in a calm and professional manner.

An effective script avoids emotive words and limits the word count to what is necessary. Sticking to the script also protects you and the business from discussing things that may introduce a litigation risk.



An Effective Script includes the following:

- Business justification for the structural changes
- Appropriate detail on the changes to the structure
- The fact that roles are being made redundant, not people
- The scope of the impact (Offices, states, divisions)
- Timing of redundancies (dates)
- Clear explanation of the separation procedure
- Time to read the letter of departure
- A professional and diplomatic close

STEP 6) Prepare Responses to Different Reactions

Individual reactions are impossible to predict, however it's important to be prepared for the range of responses that you may face. Shock may be replaced with anger, apathy or emotional distress. Be ready and adapt accordingly. Your HR representative or ALCHEMY Career Coach can workshop reactions with you and this guide introduces some of the most common.

STEP 7) Consider Special Needs

Are there any special considerations that may impact the understanding of the message including language, hearing or other physical factors? Also, are there any health issues that may be impacted by the news?

STEP 8) Security Issues

Assess the individual's access to sensitive information or equipment. Identify whether the individual can adversely impact you or the organisation through reprisal. List the key people to be notified and ensure that security procedures are in place.

PART B

Conducting the Meeting

Here is a step by step guide to conducting an effective meeting.

1) Clearly Introduce the Meeting

- Introduce the HR representative if present;
- Greet the individual calmly and professionally
- Use a businesslike and matter of fact tone;
- Avoid small talk about family, sports, weather, etc.

2) Follow the Script

Knowing and following your script will allow you to:

- Speak clearly
- Talk at an even pace and not rush
- Succinctly state the purpose of the meeting.

3) Clarify Understanding

In highly stressful situations, even clearly communicated facts are not heard or are misinterpreted. Being clear and succinct helps, however clarify understanding in the meeting, particularly if the individual reacts with shocked silence.

4) Monitor their Reaction.

It's not important or even relevant whether you agree with the person's reaction, but it is important to understand the reaction and clarify any key points that may have been misunderstood. Silence is a useful technique (once you have delivered the message) allowing time for the news to sink in and time for you to assess how this is being received.

5) Answer Questions

Acknowledge the individual and answer their questions where possible. Where information is not available or where questions can't be answered, the "broken record" technique is a useful method of keeping the discussion to script. Keep restating the facts.

6) Outline the Procedure

The separation procedure should be clearly explained covering the timetable for separation, return of property, etc. Additional matters such as special projects or client activities to be tied up should also be clarified. Redeployment options should be discussed where relevant as should any opportunity to apply for internally advertised positions.

7) Explain Severance Package and the Letter of Departure.

Allow time for the individual to read the official letter, covering important aspects such as the severance package. Exit benefits should be explained in full including the redundancy formula, superannuation and taxation principles. Also, reiterate that the statement of redundancy entitlements is an estimate only (if applicable).

Ensure the individual signs an acknowledgment that this information has been given to them and that it has been understood. If any aspect is not understood and questions remain, refer to step 5, clarify the issue and stick to the script. Ensure understanding before proceeding.

8) Conclude the Discussion Professionally and Introduce Support

Introducing the Career Coach as the next step is a useful and natural conclusion. Arrange for your ALCHEMY Career Coach to meet with the individual directly after this meeting to start the process of their Career Transition. This introduction could be along the lines of:

“Additionally, we have engaged an experienced Career Coach to work with you and they will support you to take the next steps in your career. Their name is [name] and they will work directly with you one on one.

*Note: The word ‘counselling’ can create negative responses in individuals. The service is most accurately referred to as **Career Transition** support.*

This meeting with the Career Coach may be conducted in an adjacent room or the same room and will ensure that the individual understands that comprehensive support and resources have been made available.

When concluding, avoid making statements like “I’m sorry”, or “see you around” which may imply some future contact.

Responding to Staff Member Reactions

Here are some ways to handle difficult reactions to the message of dismissal. Do not limit yourself to the examples provided. Ask yourself, "How would I most likely respond to this type of statement?"

Shock

Says nothing. Stares into space.
No response.

It's important to confirm understanding.

Try to draw the individual out with empathy.
Reconfirm the primary message.

Flight

Gets up to leave as soon as told.
Storms out before getting all the information.

Try to hold by continuing discussion.

Do NOT physically restrain, however it's important to stop the person from immediately driving.

Grief and Sadness

Tears / Sobbing.
Self-recrimination.

Put tissues within reach; ask if they would like a glass of water.

Be patient, sit quietly.

Be supportive by listening and suggest introducing them to the ALCHEMY Career Coach.

Anger

Argues.
Threats and obscenities.
Violence.

Don't react or argue.

Allow person to let off steam. Be patient.

Listen and apply the broken record technique.

If physical violence is a risk, arrange security nearby.

Denial

Refuses to accept information.

Repeat the key message.

Ask questions to confirm their understanding of the situation.

Blame

Using other factors to justify the decision.
"It's because you don't like me"

Repeat the business reasons for the change.

It's important that the reasons are made clear and unambiguous to avoid any link to other factors.

Bargaining

Attempts to negotiate an alternative.
"What if I take a pay cut"

Reinforce the finality of the decision and the next steps.

It's important that the individual is given a clear separation without holding onto the belief that there may be an option to renegotiate.

AT ALL TIMES

Be consistent

Ensure that your messages are clear and consistent. Repeat these if you need to and use the broken record technique.

Avoid Direct Confrontation

If you sense that the discussion is degenerating, bring it to a close and direct the individual to the ALCHEMY Career Coach if they are on-site.

Stick to the facts

Keep the discussion to the issues at hand. Your script will help.

Be Present

Turn mobile phones off, divert all phones and remove any laptops.

Take Notes

As a precaution, notes should be taken during the discussion to record any salient points, in the event that legal action is undertaken in the future.

Be Patient

Listen, don't react. Be patient, take your time and do not rush.

Remain Calm and Professional

Regardless of the reaction, remain calm and use a professional tone.

PART C

After the Meeting

Most of the thinking and planning has gone into managing the process up to this point, however this is just the beginning of the change process. As such, it's important to take steps to look after three groups:

- 1) The Individual;
- 2) Remaining Staff; and
- 3) You.

1) The Individual

After the meeting, work with HR to document outcomes. If your ALCHEMY Career Coach is not onsite, facilitate the earliest possible meeting or discussion between the individual and their coach – this is critical for duty of care and to start the change process.

If the individual is staying for a period of time, manage the steps that need to be taken to ensure the smoothest possible transition and exit from the organisation.

2) Remaining Staff

Immediately after the individual meetings, advise others in the workplace of the changes and the implications of these changes for them (e.g. reporting lines). Clarity, directness and transparency are critical here. Where appropriate, call teams together to communicate with the group and avoid running conversations.

A script to clarify the facts will help to keep the message clear and avoid rumour.

If you don't know or can't disclose something, be honest.

Avoid emotional conversations with staff and use the same techniques with their reactions that you used with the individual.

After a short period, 'Survivor Syndrome' will become a factor and may result in reduced engagement, motivation and performance. Talk with your ALCHEMY Career Coach about post-change recommitment workshops.

3) YOU

Too often the forgotten variable in this process is your wellbeing. Make sure you take time for yourself and get the emotional support you need, enabling you to effectively respond to a stressful and challenging situation. Talk with your ALCHEMY Career Coach about the 6 Cylinders of Wellness and look after yourself.

Further Support

Should you need further guidance or advice, don't hesitate to contact us directly.
Every circumstance is different, all are confidential.

www.alchemycm.com