CT CPASS

# You Are the Employer:

*A Guide to Hiring and Managing Personal Assistant Services*

6

## Module Six

*Communication Skills*

# YOU ARE THE EMPLOYER

## A GUIDE TO HIRING AND MANAGING PERSONAL ASSISTANT SERVICES

Hiring personal assistants may seem overwhelming.
**It does not have to be!**
This guide was developed to provide you with the skills and resources you need to hire and manage your personal assistants.

**Module 1:** Identifying Your Needs and Wants

**Module 2:** Hiring a Personal Assistant

**Module 3:** Tax Considerations

**Module 4:** Employer Responsibilities

**Module 5:** Stress Management

**Module 6:** Communication Skills

**Module 7:** Additional Resources

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This guide can be made available in alternate formats upon request.
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# LEARNING OBJECTIVES

## AFTER COMPLETING MODULE 6, YOU WILL:

- **Identify two types of self-assessment tools and why they are important.**
- **Describe individual preferences or "pet peeves" and how they impact on your role as an employer.**
- **Define the various communication styles and understand your own style and those of your employees.**
- **Define learning styles and understand which learning styles are preferred by your employees.**
- **Communicate expectations to your employees, give positive feedback and discuss areas needing improvement.**
- **Develop skills in communicating your needs in difficult situations, maintaining boundaries, being assertive, and giving feedback.**

# SECTION 1:

## INTRODUCTION

Communication is one of the most important areas of hiring and managing a personal assistant and it is also one of the most difficult areas to learn. Communication impacts how well you work with each other. As an employer, it is critical that you know how to communicate effectively with your personal assistants. This includes having a clear overview of your personality, an awareness of your preferences, as well as an understanding of your communication style and the communication style of your employee. It is also important to be aware of learning styles. The clearer your expectations, the more positive a relationship you will have with your employees.

Learning how to maintain boundaries, knowing how to be assertive, and how to provide constructive criticism are all important communication skills that help you manage difficult situations if they arise.

# SECTION 2:

## UNDERSTANDING YOUR PERSONALITY

As an employer, it is critical that you know how to communicate effectively with your personal assistants. This includes having a clear overview of your personality, an awareness of your preferences, as well as an understanding of your communication style and the style of your employee. It is also important to be aware of learning styles.

Communication is one of the most difficult areas of hiring and managing a personal assistant. It impacts your ability to work well with each other. Being an employer requires you to become familiar with your own communication style and how to communicate effectively with your employees.

Even when you have become familiar with yourself, your communication style, and the communication style of your assistant, difficult situations may arise. Learning how to maintain boundaries, knowing how to be assertive, and how to provide constructive criticism, are all important areas of communication for you to explore as an employer.

### WHY IS UNDERSTANDING MY PERSONALITY IMPORTANT?

Being an effective employer begins with having a clear understanding of your personality; enabling you to identify your preferences and what is important to you as a supervisor. We each have unique styles and preferences and we need to be aware of these because they impact on your relationship with your personal assistant.

# SELF ASSESSMENT TOOL

One of the ways to develop a clear understanding of who you are is by using personality tools, or by completing a self-assessment. These tools can help you identify your preferences, strengths, and weaknesses, and to understand how your personality traits impact your work.

The Myers-Briggs Type Indicator and the Keirsey Temperament Sorter are two well-known personality tools used to guide people in making career decisions or to gain a better understanding of their personality.

The Myers-Briggs Type Indicator (MBTI) reports your preferences on four scales, favorite word, information, decisions, and structure. Based on how people answer questions, they are categorized into one of the 16 personality types.

It is important to use the Myers-Briggs Type Indicator, and any other personality tool to understand yourself and others, rather than to put people into categories. There are no "right" or "wrong" answers. The tools are just a way to help you develop a better understanding of what you prefer.

The Keirsey Temperament Sorter, measures long-term behavior patterns or temperament through preferences rather than skills.

There are a variety of personality tools out there. Check the internet for further resources, and to purchase the actual Myers-Briggs and Keirsey Sorter tools for a more detailed resource of your personality type. Remember, only you know your "true" personality, and these are just tools to help you further understand your strengths, weaknesses, and preferences. The library and internet list a great deal of resources on personality tools, but these resources are a good place to start:

- **http://www.humanmetrics.com**
- **http://www.haleonline.com**
- **http://www.keirsey.com**

# IDENTIFY YOUR PREFERENCES?

Everyone has a particular way they like to have things done. Communicating these needs to your assistant from the very beginning will prevent many problems from occurring.

Keep in mind that your assistant also has certain ways they like to do things. If you do not clearly express to your assistant what you prefer, this can lead to problems. Try not to be too controlling about how you want things done, but do not be afraid to say what is important to you either.

Talk about your pet peeves. Some examples include how your clothes are folded, how your laundry is done, how your dishes are washed, or how your bed is made. It may also include how you like your house cleaned, or how you like to wear your clothes. Be specific and respectful of each others differences. The more you openly communicate with each other, the better your working relationship will be. Remember, we are all unique!

Communicate exactly how you need something to be completed in order to be able to access it independently, or in an emergency. For example, if you have less strength in your arms you may need to access items within your reach. This may involve where paperwork is placed on a desk, where a drink is placed, and whether a straw is needed. It is helpful to explain why this is important, so your personal assistant understands the reason things need to be positioned the way they do. This extra information will also help your assistant to remember your specific needs.

# SECTION 3:

## COMMUNICATION & LEARNING STYLES

This section provides you with an understanding of various communication and learning styles. It is helpful to become familiar with your own styles before attempting to understand your personal assistant's communication and learning styles.

### COMMUNICATION STYLES

There are four communication styles of behavior that are associated with relationships developed between people. Your ability to understand these styles, and what style you tend to use will enable you to make changes in the approach needed for positive communication. The four styles are:

- **Passive**
  Passive people tend to want to keep others happy and avoid confrontation. They tend to let others have their way on things, even if it means sacrificing their own beliefs. This often leads to feelings of resentment or hurt.

- **Aggressive**
  Aggressive people make sure they get what they want; it's their way or no way. They believe that their way is the right way, and everything else is wrong. This often makes it difficult for others to want to be around aggressive person because they are the boss and are unwilling to compromise.

- **Passive-Aggressive**
  Passive-aggressive people tend to seem accommodating at first, and willing to go with the flow. But something may occur that leads them to disrupt the original decision or plan. They may initially get along with others, but as time goes on they may be seen as manipulative, and people will tend to avoid being around them.

- **Assertive**
  Assertive people are direct, respectful, and honest. They state what they want, but are also willing to listen to what others have to say. Compromise is a part of who they are, particularly when they look at what will be best for everyone. This communication style is extremely important in being a good employer.

What are some ways to be assertive? What causes people to avoid being assertive? The article, Learning To Be Assertive (2002), states that:

*"Most people are not assertive for fear of displeasing others and of not being liked. However, although you may avoid some immediate unpleasantness by not being assertive, you could also jeopardize the relationship in the long run if you refuse to assert yourself and then feel taken advantage of over and over again."*

Being assertive requires you to become more familiar with you own values and belief system. It also requires that you further develop communication skills such as maintaining eye contact, being open to feedback, being aware of the tone you use in your voice, and knowing when it is the "right time" to be assertive. This takes practice, and is not something that you may feel comfortable doing immediately. However, communicating honestly will help you in the long run.

Become familiar with the ways people learn so you can provide support to your personal assistants to maximize their skills. This is particularly important as you are training your assistants. These styles and skills can also be helpful when you communicate with your personal assistants.

# SECTION 4:

## EXPECTATIONS & CLARITY

Clearly communicating your expectations is necessary to maintain a positive employer-employee relationship. When we meet someone for the first time, or start something new, we develop expectations in our mind about how we think it should or will be. We also bring our lifestyle and preferences to each new situation. It is important that communication begins right from the beginning of any relationship. It is also important that we communicate our needs and expectations clearly. This section will explore expectations, and how being clear is important when communicating with your assistants.

### EXPECTATIONS

Clearly communicating your expectations is necessary to maintain a healthy employer-employee relationship. When we meet someone for the first time, or start something new, we develop expectations in our own mind about how we think it should or will be. We also bring our own lifestyle and preferences to each new situation. It is important that communication begins right from the beginning of any relationship.

The first step in becoming an effective communicator is being familiar with the wants, needs, and differences that make you the person you are. Before you begin hiring personal assistants, you should have an understanding of your expectations of the tasks you want to accomplish and the personality traits of the person you would like to assist you in accomplishing these tasks.

Dennis Rivers (2004) outlines the challenges we face in communication through his book entitled, "The Seven Challenges – A Workbook and Reader About Communicating More Cooperatively." He states that

*"Because conversations are a bringing together of both persons' contributions, when you initiate a positive change in your way of talking and listening, you can single-handedly begin to change the quality of all your conversations."*

# HOW TO RESPOND TO COMMUNICATION CHALLENGES

Being clear will help you develop a positive working relationship with your assistants. At times we may take for granted that a personal assistant will understand what we want and need without being clear.

## Challenge 1 - Listen more carefully and responsively.

If you listen to someone else and acknowledge what they are saying, they will be more willing to listen to you, even if you disagree. This will go a long way towards resolving issues before they become conflicts. Here is an example of a common situation that may occur with a personal assistant:

**Situation:** *Your personal assistant comes into work 45 minutes late for the fifth time, saying that he was held up in traffic. This occurred all within the last two weeks, and it is making it difficult to complete the tasks and personal care you need for that evening.*

**Negative Response:** *You are late now for the fifth time in the last two weeks, and I am not getting done what needs to get done. You need to leave earlier so you will be here on time from now on. If you know there is already traffic that time of day, you need to plan better. You really need to start being on time from now on. Okay?*

**Positive Response:** *It sounds like it is difficult for you to balance all you need to do before you come to work. When there is traffic, it affects your ability to get here on time. However, this also affects what I need to complete before you leave for the evening, and does not provide me with enough time for the things that are important to my day-to-day life. I understand your pressures for time, but is there a way we can work this out so that I can also receive the support I need, as well as what you may need?*

Being able to acknowledge each other's feelings will help resolve future situations.

## Challenge 2 - Explain the intent of your conversation and welcome consent.

The more you involve the other person prior to beginning a conversation, the more willing they may be to spend time talking with you. Many people prefer to know that a conversation needs to occur on a particular topic, rather than having it sprung on them. Here is an example of how to state your intent and invite consent:

> **Positive statement:** *"Hi Mary, I would like to talk to you about your scheduled hours to work this month, and make sure this works for both of us. Do you have a few minutes now before we become too involved in the work we need to complete today?"*

This type of statement addresses several areas that are important to positive communication between you and your personal assistant:

It gives your personal assistant the opportunity to agree to or decline communication, making him or her feel more invested in a conversation.

It provides the personal assistant with information about the topic of conversation.

It enables your personal assistant to prepare for the conversation, especially if it is an emotional topic.

It informs the personal assistant about what his or her role is in the conversation.

## Challenge 3 - Express yourself more clearly and completely.

Sharing what you are feeling and thinking with your personal assistant will enable them to become more involved in a conversation and to gain a better understanding of a topic. Using "I" statements is very important.

## Challenge 4 - Translate your (and other people's) complaints and criticisms into specific requests, and explain your requests.

It is important to use detailed, action-oriented and positive statements, rather than general statements. The clearer you are in what you say or request, the more likely a response will have a positive outcome. Here are some examples of a response that is too general, and a response that will provide you with a better outcome.

**Generalized Statement –** *"The refrigerator is full of food that has gone bad, and it's difficult for me to fit any more food on the shelves right now until it's cleaned out."*

**Positive Request –** *"From what I can see, there is a lot of food in the refrigerator that needs to be cleaned out. Before we go shopping, this would be a good time for us to clean it out. Would you please help me clean it out now?"*

As you can see from the two statements above, the first sentence is not giving the assistant any direction. The next statement clearly states a request, and when it should be completed. Giving clear requests will result in more tasks being completed as needed. In addition, by not being detailed with your request, you open up the possibility to a future conflict. For example, if the refrigerator in the example is not cleaned out and there is no room to store the food your groceries this could create an argument. Avoid any negative issues, and be direct with your requests.

**Challenge 5 - Ask open-ended questions.** Asking open-ended questions creates more of an opportunity for a detailed response, instead of the typical yes / no response. The more dialogue in a conversation, the more likely it is that something will be understood. This leads to fewer assumptions and misunderstandings, and creates a more positive interaction. Here is an example of how to ask an open-ended question rather than a yes/no question:

**Yes / No Response –** *"Do you know how to cook?"*

**Open-ended Question –** *"What are some of your specialties that you enjoy cooking?"*

The open-ended question not only tells you whether they know how to cook, but also what they enjoy cooking. This is important if you are trying to plan out a menu for your dinner times during the week, but do not know what your assistant can cook. Being able to cook, and being able to cook the things you will enjoy eating could be different.

**Challenge 6 - Express appreciation often.**

In our busy lives, we may take for granted all that our personal assistants do for us on a day to day basis. It is easy to forget to say "thank you," but those two words are so important in building a positive relationship. Appreciation also helps to build a relationship that can survive disagreements or differences. Look for things you are grateful for and express your appreciation. This helps others to see how important they are to you. Some examples of ways to say thank you may be as follows:

*"I am so happy you are here. Thank you!"*

*"I am sure it must have been difficult coming to work this morning with the awful cold you have. Thank you for coming to work."*

*"You are terrific at helping me clean my house so well. Thank you for all you do."*

A "thank you" can go a long way, and help to increase job performance. A happy employee is a good employee!

**Challenge 7 -** Improving your communication skills as a part of your every day life. The more you practice effective communication, the easier it will become. Practice makes perfect!

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This section covers a great deal of information that is helpful in your day to day interaction with others, including your personal assistants. The more open and clear you are in your conversations, the more open your assistants will be when difficulties arise. Being an employer of personal assistants is like having a full-time job. However, while it may be a job for your personal assistant, for you it is an integral part of your life. The best way to view this need is to see it in a positive way as an opportunity. It is, in fact, an opportunity to meet lots of different people, and to build meaningful relationships.

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# SECTION 5:

## DEVELOP A POSITIVE RELATIONSHIP

This section goes into more depth regarding how to develop a positive relationship with your personal assistant. Having a clear perspective on boundaries between the employer and the employee, being assertive, and providing feedback or constructive criticism are all important elements of this relationship.

The relationship between a person with a disability and their personal assistant is a unique one. This relationship involves many personal facets of your life as a person with a disability. It also adds complexity to the needs and boundaries between the employer-employee. While the communication skills discussed so far are extremely important in building a positive relationship between a person with a disability and their employee, further discussion is needed about the situations that often present themselves in the work between an employer and their personal assistant.

## COMMUNICATE NEEDS IN DIFFICULT SITUATIONS

It's almost time for you to get ready for bed. It would be a good time for you to talk with your personal assistant about how she is having a difficult time getting to work on time lately. You have discussed this with her previously, and she became upset and started saying you were picking on her. You are becoming increasingly concerned that if this does not change you may need to hire someone else. In addition, you are believe her attitude makes it awkward for you to work with her because you are afraid to bring anything uncomfortable up. You are also concerned that she may just get upset and leave without providing you with the necessary care you need to get to bed.

One way that people often choose to handle the situation is by avoiding a discussion, but this leads to more problems. Instead, begin by going back to the section that discusses communication challenges, and express how you feel in a way that is respectful and provides an opportunity for an open discussion. Do not avoid the situation! If you have some concerns that your assistant may leave you without finishing up your support for the evening, enroll someone who could serve as a back-up in case you are stuck. This will help you to eliminate your feelings of being trapped, and enables you to discuss things openly with each other.

## MAINTAIN BOUNDARIES

What does it mean to maintain boundaries? Sue Pouppirt describes boundaries in her article Understanding Boundaries in the following way:

> *"Boundaries are rules that we communicate to others about what we will or will not accept from them. The boundaries that we establish for ourselves create a framework for who we are with the people we are close to. They are outward expressions of how we see ourselves. They define what is important to us, where our priorities lie, and how we expect to be treated. They teach others how they can show respect for us. They come from a firm sense of commitment to what we truly value, and they are only possible if we respect ourselves enough to insist upon them. Strong boundaries allow us the opportunity to get what we need and want in our relationships."*

Maintaining boundaries is particularly difficult with the relationship between a person with a disability and their personal assistant. These boundaries do not always fit into the typical employer-employee relationship due to the personal nature of the work. So what do we do to help maintain boundaries? Why are they so difficult to maintain? The following suggestions provide 5 steps to creating successful boundaries:

- **Tell the person the behavior you find unacceptable.**
- **Ask the person to change the behavior.**
- **State the consequences if he or she does not stop.**
- **Remind him or her again of the consequence.**
- **If he or she does not stop, follow through on the consequence.**

## ASSERTIVENESS OF YOUR NEEDS

What does it mean to be assertive? A tip sheet developed by the Organizational Development & Training Program in the Department of Human Resources at Tufts University describes assertiveness in the following way:

> *"Assertiveness is expressing our thoughts, feelings, and beliefs in a direct, honest, and appropriate way. It means that we have respect both for ourselves and for others. We are consciously working toward a 'win-win' solution to problems. A win-win solution means that we are trying to make sure that both parties end up with their needs met to the degree possible. An assertive person effectively influences, listens, and negotiates so that others choose to cooperate willingly."*

For some people being assertive may come naturally, but for most people it needs to be practiced. The first step is to determine whether being assertive comes naturally to you. You can do this by taking a short quiz available at: http://www.cmcsb.com/articles.htm. Go to the section under emotions and to the article called "Am I Assertive?"

Now that you are familiar with what it means to be assertive, take the following steps towards improving your skills:

- **Develop your own belief and value systems to enable you to assert yourself. This difficult because it involves developing skills that allow you to say no, ask for help, and realize it is okay to make mistakes.**
- **Use good communication skills including: maintaining direct eye contact; having a posture that is open to communication; keeping a level, proper tone of voice; and knowing when to select an appropriate time to be assertive.**
- **Then practice, practice, practice!**

## CONSTRUCTIVE CRITICISM

When providing feedback, put yourself in the other person's shoes. Here are some other tips to keep in mind:

- **Select a good time**
  Timing is important! First you want to make sure that the conversation can be held privately. You also want to be sure it is a good time for both you and your personal assistant emotionally. If either one of you are stressed, it is not a good time to have a discussion.

- **Always stay calm**
  Remain calm even if your assistant is being negative. If the conversation gets out of hand, you may want to reschedule the meeting for a time that you both can discuss things without becoming angry. As you receive feedback, it is important to listen and acknowledge what your assistant says even if you do not agree.

- **Start and Finish**
  Start and end meetings on a positive note. For example, "I really care about the success of my personal assistants and your professional development. That is why I thought it would be good to meet today." To end the meeting you could say, "Thank you for meeting with me. I believe we can work towards increasing your skills and help us achieve the goals we have set today."

Being an employer is not something you learn overnight. It takes practice and skill to be able to work with all types of people in various situations. But if you practice these skills and are open to new experiences, you will become an effective communicator!

## FREQUENTLY ASKED QUESTIONS

New employers often wonder whether it's appropriate to be friends with an employee, and how to manage the personal relationship. Frequently asked questions based on other employers who have experience hiring and managing assistants. Remember, there is no right or wrong answer to each question because everyone is different. These answers will provide you with a good starting point to help you determine what works best for you.

### Is it okay to also be friends with your personal assistant?

Because of the personal nature of the work a personal assistant does, it would be unfair to think that a close relationship is not formed. There is, however, a difference between being a friend and being an employer, and it is important this is clear to both of you. Talk about it openly with your personal assistant because more than likely it is also difficult for them to draw a line. Some employers and their assistants develop an understanding that when they are friends, they are off the clock, and that both of you should be sensitive to this. At the same time, it is not appropriate to pay your personal assistant to be your friend. When they are on the clock they need to be sensitive to the fact they are working for you.

Some employer-employee relationships may find it difficult to develop a clear set of boundaries. This is especially true if you are new to the experience of hiring and managing personal assistants. If you are not sure how to work through this situation, ask others you may know who have similar experiences or talk through the situation with someone in your life.

### How do I handle the situation when a personal assistant keeps saying that another assistant is "my favorite" and I don't treat them the same?

This can be a difficult situation, especially if the reality is that you are treating all of your assistants equally. One way to handle this is to talk with your personal assistant about why they feel another assistant is a favorite and that they are treated differently. Also, you may want to be sure you are expressing your appreciation because they may feel that they are not appreciated. Explain that everyone that works with you is unique, and each one brings something different that you like about them – whether it is a good sense of humor, being caring, organized, fun to be around, etc. Also be careful not to create any situations where you do have "a favorite" assistant. This can create obstacles and problems for you with your other personal assistants.

**My assistant thinks that since we are friends she does not have to do something she does not want to. What do I do?**

It is very important that you set clear boundaries with each other from the very beginning because there is a difference between what a friend may do to help you and what an employee will do (e.g. friends do not necessarily do windows). If you ask them to do something, make sure you are clear. If they refuse, explain to them that this is part of their job as your personal assistant. Sit down together and discuss boundaries for when they are a personal assistant and when they are a friend.

**Is it okay to give my personal assistants gifts or tokens of appreciation?**

People are always grateful when you show appreciation in some way. Some people may enjoy giving a gift to say thank you or saying how much you care, but a gift is not required. Some people may provide verbal gifts, make something specifically for the other person, send an e-card on the computer "just because" or take the other person out to dinner or somewhere fun for the day. Regardless of what you do, a thank you goes a long way.

**Is it okay to go out socially with my personal assistant? How do I handle this?**

Of course there may be times you want to do something socially with your personal assistant. You may want to discuss whether or not the social event you are attending is on the clock or off the clock. This will determine whether or not they are attending as a friend or personal assistant.

**When is it appropriate and not necessary for me to pay for meals or other social activities we do together?**

If you are attending a social activity or going out to eat when the personal assistant is on the clock and working, it is usually appropriate for you to pay for meals and social activities since they are going as part of their job. If you are both going out socially as friends and they are not on the clock, then you are usually not required to pay for any meals or social activities unless you decide you want to.

**Is it appropriate or necessary to provide my personal assistants with meals and snacks?** It is not necessary that you provide your personal assistants with meals or snacks, but it is important to be sensitive to what they may need, particularly if they are working when people typically eat lunch or dinner. If you would rather not provide them with a meal or snacks, it is a good idea to give them time for a break where they can eat or drink something. Think about how you would want to be treated if you are in their shoes. At the same time, do not let your assistant take advantage of you by eating food without your permission or if you do not offer them something. Expectations can create problems. It is also important that if you do offer a meal or snack, that you are consistent with what you decide to do. This will also help to prevent problems from occurring in the future.

**Should I provide my personal assistant with a break during their scheduled work time?** It is probably unlikely that you and your assistant work consistently throughout every minute of the time they are scheduled to work with you. However, too much of a break from work can also be a problem. Make sure you set the pace and determine what tasks need to be accomplished during each shift. You should be able to accomplish what you need. If this is not occurring, it is necessary for you to address it immediately with your assistant to prevent further problems. If a personal assistant is working a long shift, you should be aware of when a break is needed.

Keep in mind that the more practice you have with these situations, the easier it will become for you over time. Also, every situation is different and every relationship is different. The most important thing to remember is to communicate, be clear, and be consistent.

# REVIEW

1. *Name two types of self-assessments. Why are self assessments helpful?*
2. *Why is it important to be aware of your "pet peeves" and communicate them to a personal assistant?*
3. *Name the four types of communication styles. Give an example of each.*
4. *What are the three learning styles? Why is it helpful to know the learning style of a personal assistant?*
5. *Name some challenges that relate to being clear about what you need from a personal assistant?*
7. *What are the steps that can assist you with maintaining boundaries as an employer and their personal assistant?*
8. *What steps are helpful in becoming more assertive?*
9. *What is important to think about when providing feedback or constructive criticism?*

# DEFINITIONS

**Self-assessment -** Tools that can help you identify your preferences, strengths and weaknesses, and to understand how these traits impact your work.

**Boundaries -** Rules that we communicate to others about what we will accept from them. The boundaries that we establish for ourselves create a framework for how we expect to be treated.

**Constructive Criticism -** Feedback or advice intended to help or improve something, often with an offer of possible solutions.

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