

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

Separation Guide for Managers

HunterBligh Pty Ltd

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Introduction

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

HunterBligh has produced this guide in order to outline 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 occupant of that position leaves the company.

Experience shows that proper use of these procedures can help to:

- Assist the affected individual maintain self-esteem and regain other employment;
- Reduce the likelihood of misunderstanding between management and the individual;
- Minimise or eliminate negative effects that the termination of one person can have on his or her work group;
- Sustain a positive public image for the company as a fair and sensitive manager of human resources;
- Reduce the need for either party to resort to litigation.

Please note, however, that the material in this guide is not exhaustive. It is intended to provide assistance for managers and supervisors conducting separation discussions.

Specialist assistance with the legal and taxation issues that surround individual separation may be required in some circumstances.

This guide does not specifically cover separations owing to poor performance.

The Role of Managers

As a manager, you are responsible for the smooth functioning of the business, the well-being of the staff member facing separation and the well-being of those people remaining behind. Approaching the separation discussion in a professional, business-like manner is therefore crucial for the success of this important organisational change.

Your personal goal is to remain calm, regardless of the circumstances or behaviour of the other person.

Don't try to be a counsellor at the discussion. The separated staff member is unlikely to be receptive to wise counsel from the person who has just informed him or her of their retrenchment.

Although this is a stressful situation for both parties, there are four basic rules to follow in leading the process:

Rule 1

The separation discussion is the responsibility of the manager to whom the staff member reports.

Rule 2

The manager must respect the dignity of the staff member.

Rule 3

The manager must clarify the staff member's position at the discussion.

Rule 4

The manager must own the process.

Preparing for the Separation Discussion

Preparation is the key to conducting a professional meeting and remaining in control. It will help you to:

- Communicate the decision clearly;
- Provide facts clearly and with sensitivity;
- Present the decision as irreversible;
- Retain dignity;
- Understand the staff member's situation better and encourage him or her to take positive action.

There are 12 steps to follow:

1. Get Professional Advice.

Secure professional assistance through your Human Resources (HR) contact prior to taking action. In addition, your HunterBligh Outplacement consultant can assist you from the outset in planning the separation.

2. Confirm the details.

Obtain all pertinent employment conditions, entitlements and staff member work records, and gain an awareness of any health concerns that may be aggravated by the separation.

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

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 for clarity and objectivity. It is also additional protection should litigation eventuate.

3. Document the details in writing and have them checked.

Document the termination details and check with your HR Department to ensure the correct legal, policy and employee relations requirements have been met.

Prepare to give the termination details to the staff member in the standard company format at the separation discussion. This will show the staff member the finality of the company's decision.

Clearly documenting the reasons for separation is also a personal safeguard for you as a Line Manager as it provides for clarity and objectivity. It is also additional protection should litigation eventuate.

4. Act quickly once the final decision has been made.

Move quickly once you have completed your documentation and the final decision has been made. By delaying the action you provide room for suspicion and rumour that is damaging to group morale and particularly to the person or persons to be terminated.

5. Be consistent.

Ensure that your messages are clear and consistent. This will assist in communicating your company's reasons for the action taken and avoid rumour and confusion among remaining staff.

6. Prepare responses to manage the staff member's reactions.

Most staff members being terminated will feel hurt. Develop responses to possible charges of “unfair” and “underhanded”. Remember that when in shock, individuals often do not react as expected. Prepare for loud outbursts, arguments, tears, disbelief and, most commonly, the silence of shock. Be prepared to prevent the discussion from degenerating into a name-calling contest by focusing on the problem, not the person.

7. Prepare an agenda to help you keep the meeting on track.

To help you manage the discussion process, prepare yourself an agenda which outlines each of the key points you need to cover to address the issues at hand.

8. Avoid conducting the discussion on Monday mornings, Friday afternoons or pre-holidays.

The staff member separated late Friday afternoon has the entire weekend to become increasingly upset. Separation discussions should be scheduled for early in the week so the person can receive the necessary assistance to re-focus his or her career direction. Mondays should be avoided as you would usually have to set the meeting the week prior, potentially causing the employee unnecessary anxiety over the weekend.

9. Prepare a timetable for discussion.

Plan for the discussion to be kept short but remember that the affected staff member needs to feel that he or she has been fairly dealt with. You need to:

- a. Be flexible;
- b. Allow time for yourself;
- c. Remember, the staff member is entitled to answers to any pertinent questions;
- d. Provide appropriate answers at the time of the discussion. If unable to do so you will need to advise the staff member that you will seek the relevant information and come back to him or her in the quickest time possible;

- e. Be mindful that the person may not retain much information after the initial message, so invite him or her to come back to you if they have further questions.

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.

10. Consider special needs.

Consider any special needs that the person may have. These might include:

- a. Language difficulties;
- b. Hearing or physical limitations.

11. Consider the environment.

Provide a quiet, private and comfortable setting. Don't deliver the message across the desk or by phone. Ensure that relevant documentation is prepared and ready.

12. Involving your HR representative.

Where possible, your HR representative should be present at the discussion. Finally, ensure that you have a complete understanding of the legal requirements, separation practice, support services and policies covering the situation before you commence the discussion.

Conducting the Separation Discussion

Objectives

There are several objectives in conducting the separation discussion:

- Clearly convey why the position is no longer required;
- Communicate assistance and redundancy/separation details or redeployment options;
- Lay the foundation to make the transition in a smooth and orderly fashion;
- Allow both parties to progress to the next stage as effectively as possible.

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 HunterBligh Consultant 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.

There are a number of steps to follow during the discussion itself.

1. Introduce the issue in a straight forward manner.

- Ask the person to be seated;
- Speak clearly and do not rush;
- Introduce the HR representative if present;
- Begin with a calm acknowledgment of the staff member's presence through a greeting;
- Keep the discussion tone serious;
- Briefly and succinctly state the purpose of the meeting;
- Avoid idle chatter about the person's family, sports, the weather, events and the like.

2. Clarify the issues.

Each of the issues necessitating separation must be clarified. Naming the specific issues and ensuring that the person understands them are two different considerations.

In high stress situations, the staff member may hear the words, but he or she may not be able to take in what is said after the initial announcement. Therefore, be clear and succinct.

Specific issues may include:

- a. Business justification for the structural changes;
- b. Some appropriate detail on the actual changes to the structure;
- c. The fact that roles are being made redundant, not people;
- d. Impact on all offices, including those interstate (may include advice that similar processes are happening interstate at the same time);
- e. Timing (dates) of redundancies.

3. Monitor the staff member's reaction.

It may include disbelief, silence, anger, sadness, self-pity. Listen to the person's reaction and acknowledge receptivity. You are not compelled to agree or disagree with a staff member's reaction. If there are points that have been misunderstood, these should be clarified directly. Detachment is crucial for you at this point.

Avoid identifying so strongly with the staff member's feeling that objectivity is lost in the situation.

It is, however, important to acknowledge the staff member's feelings and the issues that he or she raises. Silence is a useful monitoring device. Resist the desire to talk to fill in awkward gaps. The "broken record" technique is a useful method of keeping the discussion on track. Keep restating the fundamental focus and reasons for the discussion.

4. Explain procedures.

The separation discussion should describe your expectation of the process. This may include special issues or loose ends that must be tied up or the person may need to settle his or her affairs. Be clear about any separation date, acceptance deadline, and other details. There are certain specific matters which must be covered. The Human Resources representative should be consulted in covering the following:

- a. Arrange for a HunterBligh Outplacement Consultant to be on-site at the time of the separation discussion and book a separate room where the consultant can wait until called in to meet with the staff member privately, after the separation discussion has been completed;
- b. Be aware of grievance procedures and union related issues;
- c. Redeployment options – Inform the affected staff member of any potential redeployment opportunities that may be available to them. Follow the specific procedures that must take place and which have consequences as to whether a redundancy is to proceed or not.

5. Explain severance procedures and the letter of departure.

Read the official letter, covering the important aspects such as the severance package. Exit benefits should be explained in full including the redundancy formula, superannuation, 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.

6. Conclude the discussion diplomatically.

Phrases that signal conclusion are important as they release you and the staff member from a difficult event. Refrain from making statements like “I’m sorry”, or “see you around” which may imply some future contact (if this is not desired). A useful concluding statement could be along the lines of “[name] from HunterBligh is available to meet you now. I think we have discussed everything we need to discuss at this stage. I will introduce you to him/her”.

Responding to staff member reactions.

Following are some sample responses to 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?”

- a. **“It’s not fair”** – “I acknowledge that you feel that way. However, I have to tell you that this decision is final. The important point is that you should focus on your future.”
- b. **“How am I going to pay the mortgage?”** – “I understand your concern, however, the separation package will help, and give you the time to focus on your future.”
- c. **“This is related to my performance rating from last year isn’t it?”** – “No, this is not related to that and as I have explained it is a business decision and not related to your performance.”
- d. **“This is because you don’t feel that I fit in the team”** – “No, this has nothing to do with you as a person. As I have explained it is a business decision and is related to your role.”
- e. **Sobbing** – Put tissues within reach, ask if they would like a glass of water and pour one. Be supportive by listening and suggest introducing them to the HunterBligh Outplacement Consultant. Understand that you are not a counsellor.
- f. **“OK. Now that I know what you think of me, let me tell you what I think of you”** – “I hear what you are saying. However the fact is that your position is redundant and you need to recognise that and deal with it by focusing on your future possibilities.”

Introducing the Outplacement Service

You should introduce the HunterBligh Outplacement Services available to the separated staff member during Step Four of Conducting the Separation Discussion, and should re-emphasise the services as part of your concluding statements.

This introduction could go along the lines of:

“Additionally, we have engaged an experienced Outplacement Consultant to work with you to help you understand the implications of this change in circumstances, and provide you with support in taking your next career step.

He/she is very skilled in this work. His/her name is [name] and he/she is a consultant with HunterBligh. He/she has pointed out to us that you will be his/her client, and his/her allegiance in this is to you and not to us.

It is very important that you meet with [name] now, as he/she will have some very important information that will assist you immediately. He/she is waiting for you now.”

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

The Outplacement Process

The days following separation are critical for the departing staff member with particular regard to his or her personal adjustment and psychological health.

The person who has lost employment functions is in a state of emotional and informational overload. It is easy to view this event as a personal catastrophe as it affects family and social relationships. The challenge therefore is to readjust perceptions and redirect energies.

Initial Outplacement assistance seeks to reduce the burden of negative attitudes and redirect energy towards more positive outcomes, encouraging the separated staff member to view the situation as a new beginning, rather than an end. It seeks to prevent an individual buying into the negative aspects of job loss and taking on a “victim” mentality.

To engage in the job-seeking process, an individual must be mentally equipped with attitudes that will serve him or her well.

Employers will be hesitant to hire somebody who, through their tone of voice or body language, projects a sense of desperation or lack of confidence.

An early step in the Outplacement process is to allow the person to express his or her emotional reactions to the dismissal. Having the opportunity to release these feelings is an important step in the recovery process. When emotions are bottled up and swallowed, more serious problems may surface for the person later on.

Another important function is to provide appropriate support systems. The objective here is to provide support and guidance to the extent required in dealing with family and friends and protect valued relationships. Equipping family members to handle the situation with their friends is an important outcome.

The Outplacement process can be sequential and systematic, or free-flowing and fluid, depending on the needs of the individual. In general, Outplacement/Career Transition Coaching will include providing adjustment counselling, assessment, diagnostic personality testing, and the identification of transferable career and job search skills. Résumé preparation, interview training, marketing instruction and negotiation from the job search component of this process.

More information regarding the specific HunterBligh program offered to each employee will be available from your Human Resources leader or directly from HunterBligh.

After the Separation Discussion

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 for you, the individual and remaining staff. 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 HunterBligh Consultant 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 (i.e. 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 HunterBligh Consultant 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 HunterBligh Consultant about the 6 Cylinders of Wellness and look after yourself.

Contact HunterBligh

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