Managing Yourself
Succeed in New Situations

Master these getting-to-know-you skills.
by Keith Rollag

Success almost always requires putting yourself into new situations. To further your career, you must take new jobs, join new organizations, transfer to new office locations, and meet and build relationships with new customers, suppliers, and industry peers.

Executives get a lot of advice about how to manage such scenarios: A new hire should negotiate his goals and responsibilities up front. A newly promoted leader must build credibility and influence with early wins. A relocated expatriate should study her new country and its culture. Novice conference attendees hoping to do some networking should arrive with a list of target contacts in mind.

All of those are good practices. But in 20-odd years of studying, teaching, and counseling executives

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and MBA students, I've found that the challenge many of us face in new situations is much more fundamental. Surprisingly large numbers of professionals do less than their best because they haven't mastered three basic yet critical getting-to-know-you skills: introducing themselves, remembering people's names, and asking questions.

Through interviews, surveys, and studies with hundreds of people, I've found that the anxiety most of us feel in new situations is rooted in these three activities. In the heat of the moment, we simply aren't confident or comfortable enough to perform them well. We know we need to connect with coworkers at the office and strangers at industry events, but we hesitate to approach unfamiliar people—and instead hope others will come to us. We recognize that people are impressed if we remember their names—but still find ourselves forgetting, feeling awkward, and then avoiding conversation. We realize that others have information we need, but we're reluctant to bother bosses or peers with questions about things they might expect us to know already. And it's not just shy introverts who suffer; even extroverts tell me they're frequently uncomfortable introducing themselves or asking questions, and more than 80% of people I've interviewed admit they're bad at recalling names.

Some discomfort is only natural. For most of human history, caution in new situations and around unfamiliar people was an advantage. Throughout childhood, we're told to avoid strangers and ask questions only after raising a hand. We're given little formal guidance on how to approach contacts, make introductions, and remember names. And yet, by the time we're adults, it's assumed that we're experts at these basic skills.

My research indicates that we're not. Fortunately, however, it's fairly easy to improve at them. Some of the following advice may seem familiar, but I've been told by executives at high levels—company presidents, entrepreneurs, and consulting partners—that they've benefited from it. If you're proactive and take steps to train yourself in the techniques offered here, you can set yourself up for success.

Introducing Yourself

A few years ago Columbia professors Paul Ingram and Michael Morris used a clever experiment to show that even seasoned businesspeople are reluctant to introduce themselves. They organized a networking event and, prior to it, asked attendees both what they hoped to achieve from it and whom on the attendee list they already knew. More than 95% said that their goal was to meet new people. At the event, everyone wore a special badge that tracked who talked to whom. The researchers found that despite their stated intentions, most of the executives spent the majority of their time with attendees they already knew and met new people only if they had acquaintances in common.

In my interviews I've heard three reasons why people hesitate to approach others: They worry about interrupting or bothering people, fear making mistakes during an introduction, or dread the possibility of rejection. But it's important to push through those feelings. If introductions don't happen at a networking event, you miss out on opportunities. If they don't happen at the office, you fall into a pattern of awkward smiles, nods, and waves and never forge critical relationships.

IN PRACTICE: "IT'S UP TO ME TO TAKE THE INITIATIVE"

Arthur, a new engineer at an internet start-up, initially shied away from introducing himself to his busy coworkers in his first week on the job. He was frustrated that so few of them had reached out to him. But, recognizing that he couldn't succeed without getting to know his peers, he finally decided to put himself out there. He rehearsed opening lines, then walked around the office looking for colleagues who seemed interruptible. After saying hello, he introduced himself, described his role, and asked about their work.

The experiment was a success. "I approached several other design engineers, and they all dropped their work and shifted attention to me," he later wrote in his journal. "The lesson is that it's up to me to take the initiative instead of waiting in my cubicle and feeling disappointed about others' inactivity."

With newfound confidence, he subsequently approached the CEO and other senior managers and ultimately developed a productive mentee-mentor relationship with the VP of engineering.

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How do you get better at introducing yourself?

Put yourself in the other person's shoes. If the roles were reversed and that individual came up to you, how would you feel? If you'd be open to an introduction, expect that he would be too, and go for it. Don't assume that senior executives have little interest in meeting people further down in the organization.

Practice your opening lines. While all introductions are unique, the name exchange, handshake, and ensuing small talk usually follow common patterns. Create some opening lines and try them out. Write down, rehearse, and experiment with what you will tell others about yourself. Note what sustains interest and what causes other people's eyes to glaze over. Then edit your approach accordingly.

Job seekers who participate in programs that teach job search skills, such as proactivity, self-presentation, and social networking, are **2.67 times more likely to land jobs** than those who don't engage in such interventions.

"EFFECTIVENESS OF JOB SEARCH INTERVENTIONS: A META-ANALYTIC REVIEW," BY SONGQI LIU, JASON L. HUANG, AND MO WANG

Make the other person feel heard, valued, and respected. Great first impressions rarely hinge on what you reveal about yourself; what matters is how you make your counterpart feel. Ask her about herself and her job, listen intently, show interest, and be energetic.

Write things down. Don't trust your memory. As soon as you can, write down everything you have learned about the person's background and interests. When you know you're going to meet again, review your notes.

Remembering Names

When I ask students in my executive education and MBA classes if they easily learn and recall people's names, typically fewer than 10% of them raise their hands. You might think you're particularly forgetful, but many of us forget names within seconds of hearing them.

Why? Neuroscientists have shown that we actually process and store proper names differently from other things we learn about people, such as their faces, roles, and life histories. Initially, the neural connection between what we know about people and their names tends to be very weak, so when we meet them again we blank on the latter.

The problem isn't in forgetting a name; it's what we do when we suddenly come up blank. We might avoid the person, fake familiarity with a "Hey, man," or awkwardly try to get the person to reintroduce himself. According to a survey by the British gaming company Ladbrokes, the embarrassing moment we fear most is forgetting the name of someone we're introducing.

Although this is a widespread and understandable problem, it's also one executives must overcome. People feel more warmly toward those who remember crucial information about them, including their names, and that amity can serve as a springboard to fruitful conversations and deeper trust. Taking these steps can help:

Commit to paying attention. Often we blank on names because we aren't focusing on them when we first hear them. Our minds are preoccupied with the handshake, what we'll say next, or other random thoughts. Every time you meet someone new, remind yourself to pay attention to his or her name.

Repeat the name, and test your recall during the conversation. Saying a name out loud right after you hear it helps lodge it in your short-term memory, and mentally testing your recall, even as you're in the midst of the introduction, helps reinforce the neural pathways. If you still forget the name, you can ask for it again before you part ways.

Write it down. As with other key details about people, the best thing you can do to ensure recall is to record their names as soon as possible in a place you can access later (a notebook, phone, or computer). Research has shown that writing or typing a name improves retention.

Study and retest your recall. Find time to review the names you've written down and try to call up the faces of those people and their personal information. Walk around the office (or look at coworkers' pictures) and in your mind go through the names of those you see.

Use vivid imagery. Because we remember the things we know about people better than names, it helps to associate a person with a mental picture that provides a clue to his or her name. Imagine Phillip Carmichael trying to fill a car with all the Michaels you know. When talking to Gayle, focus on her glasses, since that word starts with the same first letter as her name. Combine these techniques with frequent tests of recall, and eventually you won't need the imagery to trigger your memory.

Use cheat sheets. You can't plan for unexpected encounters, but meetings and events are a different story. Find out which people are attending, and review their names in advance. Research has shown that this gets names back into your short-term memory and significantly increases the chance you'll retrieve them when you need to.

IN PRACTICE: SEVEN TIMES BETTER AT NAME RECALL

Doug, a senior manager at a financial services firm, used to be "pathetic" at remembering names. "It would be in one ear and out the other," he explains. This became a big liability when he moved from managing operations to managing sales. "I was building a relationship with a potential client and over several months met him at networking events, even a few times for dinner and drinks. I thought his name was Jason and called him that multiple times. Only later did a colleague pull me aside and tell me that his name was Mark. I was horrified. I apologized, and he was nice about it, but for months I was gun-shy about saying people's names."

However, once Doug committed to paying attention to names and began repeating and reviewing them and associating them with mental images, his recall began to improve. "Before, I'd probably remember only 10% of names. Now I remember 75% or more."

Today he's much more confident of his ability to recall names. In fact, a few months ago he saved the day for a former boss and mentor during an unexpected encounter with a potential business partner, whom both men had met at a networking event. After a few minutes of small talk, the other person excused himself to visit the restroom. Doug's mentor turned to him in a panic and said, "For the life of me, I can't remember his name." Doug not only was able to recall it but could also provide a few more facts about the man so that, when he returned, the conversation was much more successful.

Asking Questions

According to several studies, including those by Elizabeth Morrison at New York University, the more questions new employees ask and the more help they seek, the better they perform. Research shows that question askers are also more satisfied in new jobs and more committed to new organizations. But when interviewed about what in hindsight they got wrong in starting a new role, executives most commonly say, "I didn't ask enough questions."

Consider the story of one computer programmer I spoke with. A few weeks into a new job, he discovered that his first project would require him to combine two large segments of computer code. Rather than asking his cubicle neighbors how he might accomplish that task, he dove in and spent two weeks working alone to complete it. After he was done, he found out that his company had months earlier purchased a software tool that could have done the job in minutes.

> The difficulty is in fighting natural biases against social risk and changing lifelong habits.

Why are we loath to ask questions? As with introductions, some of us are uncomfortable interrupting busy coworkers. Others find it hard to admit that they don't know something or can't figure it out. Our egos keep us from reaching out to the experienced people that can much more easily solve our problems.

How can you get better at asking questions? Here are a few ideas:

Consider what you want and why. Do you need information, advice, feedback, assistance, or permission? Are you asking for a few minutes of time or something more? The clearer you can be about what you want, the easier it will be to ask.

Determine whom to ask and if the time is right. Given your question, who is most knowledgeable, available, and approachable? Can you catch that person alone at her desk, after a meeting, or during lunch? One trick is to ask people during introductions if you can contact them later for advice. Then you have them on record with a commitment to help you. And sometimes changing your question from "Do you know how to…" to "Who might explain how to…" makes it less intrusive to the person being asked.

Ask short, to-the-point questions. Avoid multipart questions that are hard to understand, much less answer. Instead of saying, "Hey, I'm not sure what to do with this report, and what goes where, and do we have to distribute this to both sales and marketing?" it's better to ask, "Can you show me how to format this report? Five minutes of your time, and I'll be good to go." Once someone has helped you with formatting, your next question can be about distribution strategies.

Say thank you and close the loop. Don't underestimate the power of gratitude. Researchers Adam Grant and Francesca Gino have shown that expressing appreciation makes other people feel valued and predisposes them to help you the next time.

Cultivate a buddy. Many newcomers discover that finding a colleague who'll agree to be their initial "go-to" person makes it much easier to ask questions. Often this person is not a highly experienced veteran but someone who still remembers what it's like to be new.

FOR MOST of the executives and students I coach, the difficulty isn't in understanding how to introduce themselves, ask questions, or recall names. It is in fighting natural biases against social risk and changing lifelong habits. Real progress comes only through mindful reflection and practice. Be patient but committed, and remember that as you become more confident with introductions, names, and questions, you'll set yourself up to be more proactive and effective at all the other skills required to be a successful newcomer at any event, office, or organization.

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IN PRACTICE: A NEW ATTITUDE TOWARD INQUIRY

Sarah, an engineering project manager who graduated from a prestigious university, admits that she was "terrified" of asking questions when she first started working at a fast-growing technology company. "I was afraid I would seem dumb," she explains. As a result, she found herself wasting a great deal of time. "I was trying to learn what someone could have told me in a few minutes."

When she was assigned to her first project, she really wanted to ask the founder and CEO of the company about its history and strategy. But for weeks she hesitated, thinking, "I can't. He's out-of-control busy."

When she finally mustered the courage, his response couldn't have been more positive. "He said, 'Of course—I can't believe I didn't do this earlier,' and dragged me into a room, so excited to talk to me," Sarah recalls. "I was kicking myself for not asking earlier."

After that, it became much easier for her to approach not only the CEO but other senior managers with questions. Her career at that firm was successful and, capitalizing on her new attitude toward inquiry, she eventually became the chief technology officer of a major corporation.