

Behind The Transaction at a PUI

By Stacy A. Riseman

Twenty-five years' experience in sponsored programs, several years working with people at research intensive schools and smaller PUIs, working in different states and with different personalities, employed at profession-specific universities, medical institutions, art schools and liberal arts colleges, all this equates to being an expert in transactions in my field, right?

Wrong. As time goes on, you would think that we'd get better at our profession and it would get easier conducting business with other folks. Transactions can be broken down into step-by-step guidelines, procedures, policies, forms, online applications, emails, phone calls, and meetings, but all of these things are only as good as the end users, their interpretation of these transaction media and what we are trying to accomplish. We can automate anything but at the end of the day, it's still human beings at the end of the transactions. How they, in turn, interpret the medium of the transaction will determine the success or failure of the activity.

In order to have your transactions be successful, you must go above and beyond the activity to develop a professional yet human relationship with the end users. I've found that working at a PUI, as well as a liberal arts institution, yields end users who may not possess the same level of experience, education, or personality that I may have in sponsored programs. My end users have been exposed less to the daily transactions, rules, and regulations of activities related to the administration of research. It's my job to help them see *why*, not just how, to do something a specific way. It is up to me to spend more time explaining something, and backing up my requests with examples or specific references to regulations and policy, while not putting them to sleep with long, drawn out details. At PUIs, we must realize that the end users not only need to trust the person asking for the completion of the activity but also feel confident in completing what has been asked of them as doing the right thing. It's complicated

and not an easy feat. I've learned that trust is what you need to build with each person from the beginning to the end of every transaction.

Here are some simple things to keep in mind that might aid your next transaction. Pick up the phone and call someone in lieu of using email. If you find that emailing brings a response which yields more confusion, pick up the phone before emailing back. At that point, a voice on the other end of the phone might help in getting a positive result much faster. When you call someone, notice the tone of your voice. A soothing and calm voice will help the person feel more comfortable listening to you and, in turn, will allow the person to feel safe enough to ask questions to satisfy any original apprehension. During your communications, use the person's name if you can. This allows the individual to feel that you are invested and connected personally, and not just focused on the end result. Try to figure out the person's communication style. This may take a couple of transactions with a person but if you pay attention to the individual instead of the business you are trying to accomplish, you will find this is quite simple. Individuals give clues such as being abrupt or detailed in their responses. If a person is abrupt, you might adjust your communication to be a little quicker and to the point. If a person is detailed, you might present a more in-depth view of what you are asking them to do. Also, offer to meet in person and discuss a situation that appears to make the individual uneasy in any way. Face-to-face meetings always seem to yield a more positive result, especially at a PUI where it is usually much easier to meet than at a larger institution. ■



Stacy A. Riseman is Director of the Office of Sponsored Research at College of the Holy Cross. She is an active NCURA member at the regional and national levels, presenting at conferences and serving on committees. For her significant contributions to Region I, she received the Merit Award in 2013. She can be reached at sriseman@holycross.edu

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