The 7 Steps To Having A Successful Meeting With Upset Parents
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A Better Way

As private school leaders, we know that dealing with parents is part of the job. Most of our parents are great or they are pretty workable with some effort. Unfortunately, there are some parents that get really upset about an issue at school and they want to meet with you and talk about it.

We spend a lot of time and emotional energy stressing out about having meetings with upset parents. I am going to teach you The 7 Steps To Having Successful Meetings With Upset Parents. Will it work every single time? No. Will it work most of the time and reduce your stress levels? Yes!

I think that one of the reasons that we get so anxious and stressed out about meeting with some of our parents is because we don’t have a plan. We just envision “that parent” walking into our office and screaming at us, making unreasonable demands and then storming out without resolving anything. There is a better way.

- Just like every good coach has a game plan, you need a plan for parent meetings.
- Just like every excellent teacher has a lesson plan, you need a plan for parent meetings.
- Just like every successful corporation has a business plan, you need a plan for parent meetings.

Armed with a plan, you will feel more confident, you will find it easier to get the meeting back on track and you will have tangible outcomes from your meeting. The only thing worse than having a meeting with an upset parent is having a second meeting with the same parent because nothing was accomplished at the first meeting.

The 7 Steps

- Prerequisite: Remember What They Send
- Step 1: Setting Up The Meeting
- Step 2: Preparing For The Meeting
- Step 3: Mindset Shift
- Step 4: Beginning
- Step 5: Middle
- Step 6: End
- Step 7: Post-Meeting

Prerequisite

When you were in college, you had certain prerequisites that you had to fulfill before you could take certain classes. You had to pass Psych 101 before signing up for Advanced Psychology
201. You had to pass Biology 101 before signing up for Anatomy 101. In order to properly use The 7 Steps, you have to understand the reason why parents are so emotional when they want to meet with you. Sometimes you may be saying to yourself, “They are clearly overreacting here.” or “I just can’t understand why they are so upset about this.” It comes down to what they send to your school.

**Remember What They Send**

Think about this in terms of what the parents are sending to your school. Parents are sending their children and their money to your school. There is nothing on this planet that they care more about than their children. They also work very hard to earn the money that they pay in tuition dollars. I have three daughters and I get very emotional about my daughters even though they are all adults now. I want them to be emotionally and physically safe, I have made a huge emotional investment in their futures. I also have hopes and fears about their futures. Your parents have hopes and fears about their children.

We are engaged in high stakes, emotional work. Parents are very emotional and passionate about their children. They also sometimes get emotional about their money and how hard they work for the money that they earn to pay tuition. Sometimes that emotion, passion and anxiety comes out in inappropriate ways.

No matter how it makes us feel, we need to remember that parents are paying money for a service. When they feel like they are not getting good value for their financial investment (tuition dollars), they are going to get upset and complain. Add to that the emotions of whether or not they think that your school is meeting all of their child’s needs and you have a cocktail of complex feelings that often is expressed in unconstructive ways.

**Step 1: Setting Up The Meeting**

Never Allow the “Ambush Meeting”

- An “ambush meeting” is when a parent walks up to you at a soccer game or the band concert and says, “Can we talk about __________?”
- It might start out as small talk and then turn into the start of a meeting about a school issue.
- You need to say, “This isn’t the best place to have that conversation. I want to make sure that this issue gets my undivided attention and that we have privacy when we talk. What day and time work best for you?.”
- Then, pull out your phone and ask the parent to pull up their calendar and get something scheduled. If the parent needs to check on a few things at work, with their partner, etc., then just say that your Administrative Assistant will reach out to them in the morning.
- Resist the temptation to just “get it over with” and have the meeting right there. It will not be an effective meeting and you are also sending the message that the parents at your school can meet with you anytime, anywhere. Today it is the bleachers at the basketball game, but tomorrow it will be the grocery store or at church.
• Of course, not every issue requires a meeting. Perhaps, the parent wants to complain that the lunch line was too long that day and his daughter’s lunch was cold. It may be easier to listen, acknowledge and validate that parent’s feelings and say that you will look into it. Not every informal conversation needs to be cut off and turned into a meeting or a phone call. That said, far too many private school leaders have zero boundaries in this area and the parents know it.
• Use wisdom and discernment. Be kind, but also be assertive.

Time of Day
• If I know that I am going to have to bring my “A Game” to a meeting, I would much rather schedule it in the morning than in the afternoon.
• I know that I will have more energy and less decision fatigue.
• I am more likely to “stick to my guns” and follow school policy and not get pushed around in the morning.
• Of course, we need to work with the parent’s schedule and later afternoon or early evening may be the only option. If that is the case, make sure to get up and move your body shortly before the meeting. Also, make sure that you are not starving or dehydrated. Most of us do not drink enough water and far too many of us skip lunch too often.

Length
• I very rarely schedule a meeting longer than 30 minutes. Most effective parent meetings can take place in 30 minutes or less when you have a plan and you keep things moving along.
• Scheduling 60 minutes just opens the door to rehashing the situation in too much detail.
• Parkinson’s Law says that “work expands to fill the time available for its completion”. If you schedule a 60 minute meeting, it will almost certainly take 60 minutes, but I have found that nearly every school issue can be adequately discussed in 30 minutes or less.

Schedule Time for Yourself After the Meeting
• This is very important! When you schedule the meeting, always schedule 5-10 minutes of time after the meeting for you to do post-meeting follow up.
• To be clear, if you have a meeting scheduled with Jason Williams, from 9:00-9:30AM, you are going to schedule “Meeting Follow-Up” from 9:30-9:40AM.
• Exactly what to do after the meeting will be discussed in Step 7.

Step 2: Preparing For The Meeting

Gather Information
• When a parent requests a meeting, it is always best to know why they want to meet. Of course, if you requested the meeting then you already know why you want to meet. This is when you start to gather information.
• If a parent is upset about something that happened in a classroom, talk to the teacher and try to find out as much background information as possible.
That said, don’t feel like you need to know every single detail of the situation ahead of time. There have been times when I try to be “over-prepared” and I often end up wasting time on details that the parent doesn’t even want to discuss.

Seating Logistics

- Many private school leaders have a desk with two guest chairs on the other side of their desk. This is not an ideal setup for a meeting with an upset parent. The “psychological distance” and power dynamic that the desk creates can impact the high level of communication and understanding that you hope to achieve.
- In my office, I use a small, round table with three chairs for all of my meetings with parents. There is no psychological distance when sitting at a round table. This is not a deal breaker if this setup is not possible, but it does help.
- Whenever I meet with parents, I always make sure that there is a clock on the wall behind them. You could also have a visible clock on a bookshelf behind the parents. This way, I can always know the time without looking down at my watch. Looking at my watch sends the wrong message to the parent. They will think that I am feeling nervous or impatient and that I want the meeting to be over. With proper seating logistics and preparation, you will never need to look at your watch, you will look just past the parent or just above their head.

Limit Interruptions

- The number of interruptions that you will experience has a lot to do with the visibility/location of your office and the role played by the school’s office staff.
- Ideally, someone can be a “gatekeeper” while you are in the meeting. Most of us have an open door policy and want to be seen as accessible to our team. However, there are times when your office door needs to be shut and a person needs to run interference for you. This is definitely one of those times.
- Keep in mind that there are still many ways that people can interrupt your meeting even when your door is closed. For me, I have my cell phone, a walkie-talkie and a desk phone where anyone in the school can buzz my extension or the office can do an “all call” that comes through the speaker on my desk phone.
- I never look at my cell phone or answer my desk phone intercom during a meeting with a parent. If it is truly an emergency, I know that someone in the main office will call me on my walkie-talkie.
- Always remember that your definition of urgent and other people’s definition of urgent are rarely the same.
- When you ignore your cell phone and your desk phone intercom, you send a clear message to the parent that they have your undivided attention.

Step #3: Mindset Shift

- **Optimism:** Approach every meeting with the mindset that “this is going to be a productive meeting”. I didn’t say it was going to be fun. I didn’t say it was going to be
awesome. If we approach every meeting with optimism and a mindset that it can be productive, it is much more likely to go well.

- **Remember the Child in the Chair:** Before the meeting, visualize the child of this parent sitting at a desk in a classroom at your school. It is so easy to forget the child if they are not at the meeting. The parent is right there in front of you, speaking loudly. Try to see past the parent and do what is in the best interest of “the child in the chair”.
- **“If you don’t have the confidence, reach for the courage.”** I don’t know the origin of this quote, but it has helped me to say what needs to be said when I am having a meeting with an upset parent. We usually don’t have enough confidence to say what needs to be said or do what needs to be done. It is in those times that we will reach for the courage.
- **Jedi mind tricks:** Like Luke Skywalker in Star Wars, sometimes we need to use Jedi mind tricks to get us through a difficult meeting. When I have a particularly difficult meeting on my schedule, I think about specific things that will happen after the meeting. I will actually envision myself sitting at the kitchen table, having dinner with my wife. It helps me to remember that there is life after this meeting.
- **Put on your armor:** Another little mind trick that I use is that I picture myself putting on a suit of armor. No matter what this parent says, their words are not going to penetrate my imaginary suit of armor.
- **Remember that this is not a zero-sum game.** In a zero sum game, you must lose in order for me to win. When we think about meetings in terms of winners and losers, the child will lose every time. Think about this meeting as an opportunity for the child to be the winner.
- **Reduce Anxiety:** If I am feeling anxious or stressed out before a parent meeting, I will do a short mindfulness practice that takes about two minutes. I inhale for a three count and then exhale on a three count while I name the following things: 5 things I see, (I then close my eyes) 4 things I hear, 3 things I feel, 2 things I smell, 1 thing I taste. That’s a total of 15 breaths and it works wonders for me.

**Step #4: The Beginning**

**How To Start**

- Start with a big smile, eye contact and a firm handshake. Thank the parents for coming in to meet with you.
- Engage in very brief small talk. You only have 30 minutes, so don’t waste nine of those minutes talking about the weather or the local sports team.
- If they asked for the meeting, let them go first: “So, please tell me what’s on your mind.”
- If you called the meeting, then you go first: “So, I would like to talk to you about…..”
- For the purposes of this 7 Step Formula, we are going to assume that the parent asked to meet with you because they are upset about something.

**Listen Deeply**
● **Let them talk and don't interrupt.** *This is the most important part of the entire meeting.* You are going to hear things that are factually inaccurate. You are going to hear accusations. You are going to hear that the teacher doesn’t care about the child.

● **Let them talk and don't interrupt.** It is so important that I **had to put it here twice!** Just let them go until they run out of steam. It will feel like a lot longer than it is. Usually it will be five minutes or less, sometimes it will be 10 minutes. In 32 years, my record is 17 minutes, but more than 10 minutes is **very rare.**

● While they are talking, you are going to jot down notes of what they are saying. This is in case you decide to correct factual inaccuracies or respond to accusations. (More on that in a moment).

● While they are talking: REMAIN CALM, REMAIN CALM, REMAIN CALM.

● While they are talking you are using active listening body language. You are calm, confident and professional.

● Remember that listening with the intent to respond is **not listening.**

● As hard as it is, try not to take what they say personally. Remember that this parent is often speaking from a place of fear and anxiety.

**Sidebar**

● I want to take a quick sidebar here and make sure that you know that there are rare occasions when you do need to cut the parent off and end the meeting prematurely.

● You need to end the meeting if the parent is being verbally abusive, using profanity or being too aggressive.

● How? Stand up and start walking toward your office door. Typically, this will cause the parent to stop talking and you will say, **“I am sorry that we are going to be unable to finish our meeting today. We will reschedule the meeting for another time when you are able to communicate more appropriately.”**

● It is very likely that your Family Handbook has some language about respectful discourse. I would recommend that you borrow a phrase or two from that language. It is important to know exactly what you are going to say ahead of time. Don’t try to come up with what to say in the heat of the moment.

● **Too many private school leaders let themselves be a whipping post and a doormat.** You are a professional. There are limits in every workplace about what will be tolerated when it comes to inappropriate communication.

● **“What you allow is what will continue.”** (Author Unknown)

● If this happens on a phone call with a parent, try to talk over them to say, **“I am sorry that we are going to be unable to finish our meeting today. We will reschedule the meeting for another time when you are able to communicate more appropriately.”** If they won’t let you talk, then hang up the phone.

● If you have to end a meeting or a phone call prematurely, send your Board President or Head of School a short email just to give them a heads up.

● I am not trying to alarm you or put thoughts into your head on how things might go sideways. In 32 years, I have had to end a meeting prematurely around five times and I have had to call security just once in my career. These cases are extremely rare, but it is always good to know what to do.
Step #5 The Middle

“First of all…..”

● The parent has shared their concerns, you have listened intently, you have not interrupted and so now it is your turn to speak.
● I said, “Let them talk and don't interrupt.” is the most important part of the meeting. The second most important part of the meeting is what you say next.
● You are always going to say three words: “First of all…..”
● “First of all, this sounds really, really hard for Olivia and for you too. Moving to a new school and a new city can be really challenging. I can see why Olivia is feeling left out when she sees her classmates doing things outside of school.”
● “First of all, I want to say that sounds very difficult and I can see why that would be upsetting for Jacob. From his perspective he comes to all of the practices and he is wondering why he isn’t getting more playing time.”
● In my experience, about 90% of parents that are upset just want to be heard and to have their feelings validated.
● I really want you to hear this: In my experience, about 90% of parents that are upset just want to be heard and to have their feelings validated.
● If the first words out of your mouth are correcting inaccuracies in what the parent said or responding to accusations that they made, you are not going to have a productive meeting. I’m not saying that you won’t get to those items eventually, it just can’t be the first thing that you say.
● By leading with “First of all….” you are helping the parent to feel heard, you are validating their feelings (whether you agree with them or not) and you are leading with empathy.

Find Common Ground

● Try to find anything in what the parent said that you can agree with and then actually say, “I agree with you when you said…..”. This may be difficult, but try to find at least one thing.
● Use the words “we” and “together” and the phrase “partner with you” as much as possible. The goal of this meeting is to move from “School vs. Parent” to a collaborative partnership that benefits the child.
● Check for understanding. George Bernard Shaw once said, “The single biggest problem in communication is the illusion that it has occurred.” You are not going to let that happen. Actual communication means that both sides understand each other, so use phrases like, “So, what I am hearing you say is…..” to give the parent the opportunity to agree or to clarify what they want to communicate.

Focus

● Focus on behaviors, not opinions.
● Focus on facts, not feelings. You can never disagree with how someone feels. As hard as it will be, focus on the facts of the situation: What did the child actually do? What did
the teacher actually see? What does the handbook actually say? What grade did the child actually earn?

● Focus on observed behaviors rather than hearsay.
● Focus on regulating your mood. You may earn your Academy Award, but don’t let what’s going on inside of you show on the outside. You are a calm, organized professional. You are a calm, organized professional.
● Focus on not being defensive. Do not over-explain the situation. (I still struggle with this to this day).
● Focus on the fact that it is OK to apologize if you or one of your teachers messed up. I used to think that apologizing was a sign of weakness and that it meant that “I lost” the meeting. If you or your school messed up, own it, apologize and say that you will work hard to make it better.
● Focus on discussing the past without dwelling on it and trying to keep the focus on the future.

Two Things To Keep In Mind When Wrapping Up The Middle

First, don’t make promises you can’t keep.

● I have done this far too many times. The meeting is uncomfortable and I just want it to end, so I promise the daily email from the 3rd Grade teacher or something else that is totally unsustainable and unnecessary. I do it to get the meeting over with.
● I have learned that if I don’t get caught up in the emotion of the meeting and I focus on the feasibility of the promise before I make it, then I am much more likely to be able to keep the promise that I made to the parent.

Second, decide what to do about your notes.

● While the parent was talking, you jotted down some notes. Sometimes the parent will say things that are not accurate. Sometimes they will make accusations.
● This is the time in the meeting when you have to make a decision. You have to decide if you are going to revisit those comments and point out where the parent was wrong or if you are going to let it go.
● This takes wisdom, discernment and experience to know what to address and what to ignore.
● I lean more towards letting it go unless they are calling the integrity of the teacher or the school into question.
● There is no “one size fits all” recommendation on what to address and what to ignore. That said, here are three bits of advice. First, if you choose to address it, don’t let it be the first thing out of your mouth when the parent stops talking. Second, remember that they are coming from a place of emotion, not a place of logic. Third, you have to ask yourself if “being right” is more important than “the child in the chair”.

Step #6 The End

Next Steps
What signifies the shift from the middle to the end of the meeting is when you start to talk about what happens next.

Sometimes there are no next steps because a parent was upset, you heard them, you validated their feelings and you treated them with respect. That is the definition of a successful meeting.

However, most meetings require some sort of next steps to improve the situation that was just discussed.

I like to keep it simple with 1-2 clear and actionable steps.

Whenever possible, offer more than one solution so that the parent has some agency. This is not always possible and you often have a couple of next steps that you strongly prefer.

Make sure that the next steps are very clear to the parent.

Let’s say that I just had a meeting with the mother of a 7th Grader named Olivia. This family just moved to our city three weeks ago and Olivia’s mom is concerned that she has not yet developed close friendships with her 7th Grade classmates.

For example, “First, I am going to speak with our Middle School teachers and ask them to keep an eye on how Olivia is interacting with her peers and to be mindful of how they configure students for group work. Second, I will have Ms. Thompson, our school counselor, meet with Olivia to discuss strategies Olivia can use to integrate herself into the 7th Grade social circle. Third, we will connect on Zoom for 15 minutes, three weeks from today, to check in and see how things are feeling for Olivia.”

Wrapping It Up

When it is time to conclude the meeting, you need to use your words and your body language at the same time.

Words: “Well, I want to be respectful of everyone’s time….”

Body language: close your notebook, put down your pen, stand up, etc.

Your administrative assistant can also play a role in making sure that the meeting ends on time (or close to it). You should arrange a strategy ahead of time. I suggest that at the 35 minute mark, your Administrative Assistant knocks on the door and opens it a little. You say, “Sorry, but I need to get on to my next appointment.” You will always be telling the truth because you have always scheduled your next appointment. It is an appointment with yourself to do the essential follow up work for the meeting that has just ended. NEVER ask your Administrative Assistant to lie. “You have a phone call on line 2.” or “You are needed in Room 201 right now.” are lies. Prioritize your integrity, be assertive and end your meetings on time.

Step #7: Post meeting

What happens after the meeting is just as important (and sometimes more important) as what happened during the meeting. Usually, you are flooded with such a sense of relief when the meeting ends. That's understandable, but it can also derail the next steps that were agreed upon if you do not carefully navigate your post-meeting tasks.
To make sure that you are effectively handling your post-meeting tasks, you are always going to schedule 10 minutes after the meeting. During that 10 minutes, here's what you are going to do.

"Make an appointment with the promise"
- This means that you are going to schedule into your calendar exactly what you agreed to do.
- If you said that you would follow up with a call in three weeks, then schedule it.
- If you said that you would check in with the teacher once a week and send them an email in a month, then schedule it.
- Trust is built by keeping your promises. That said, you have a very demanding job and it is very difficult to follow through on our promises unless you "make an appointment with the promise".

Summary email to parent
- Send a short email to the parent that thanks them for coming, briefly summarizes what was discussed and lists the next steps that were agreed upon by both parties.
- You did a great job with the meeting. You were courageous and said things that were hard to say. Don't let that go to waste because you think that you are on the same page with the parent when you are on slightly different pages at the end of the meeting.
- This also takes away the parent's ability to say "you never said that" or "I never agreed to that" several weeks down the road.

Follow up with all affected employees
- It is very likely that you are going to need to follow up with a teacher or other staff member after the meeting with the parent.
- For example, you may have told the parent that "Mr. Jones will check in with Samantha once a week" or "Ms. Smith will keep an eye on the social dynamic and reach out to you if she has any concerns."
- It may sound obvious, but if you need to follow up with someone, then just make sure that you do it.

Conclusion and Summary

The 7 Steps To Having Successful Meetings With Upset Parents

Prerequisite: Remember What They Send
- Parents send their children and their money to our schools.
- Parents will get emotional when they feel like we are not meeting their child's needs at our schools.

Step 1: Setting Up The Meeting
- Never allow the “ambush meeting”.
- Carefully select the time of day when the meeting should take place.
- The vast majority of parent meetings should be 30 minutes or less.
• Schedule 10 minutes for yourself after the meeting so that you can “make an appointment with the promise” and write a brief summary email.

Step 2: Preparing For The Meeting
• Gather information.
• Be aware of the psychological impact of the seating arrangement.
• Make sure that you are able to see a clock during the meeting.
• Be proactive and limit interruptions.

Step 3: Mindset Shift
• Display Optimism
• Remember “The Child In The Chair”
• “If you don’t have the confidence, reach for the courage”.
• Put on your “suit of armor”
• Remember that this is not a zero-sum game.
• Use mindfulness techniques, meditation or prayer to reduce anxiety.

Step 4: Beginning
• Start with a big smile, eye contact and a firm handshake. Thank the parents for coming in to meet with you.
• Engage in very brief small talk.
• If the parent asked for the meeting, let them speak first and don’t interrupt.
• Do not let yourself be the whipping post or the doormat. Know when and how to abruptly end the meeting when necessary.

Step 5: Middle
• Start with “First of all….”
• Find common ground.
• Focus on facts, not feelings.
• Don’t make promises that you can’t keep.

Step 6: End
• Keep it simple with 1-2 clear and actionable steps.
• When it is time to conclude the meeting, you need to use your words and your body language at the same time.

Step 7: Post-Meeting
• Always schedule 10 minutes for yourself at the end of the meeting.
• Make an “appointment with the promise”.
• Send a summary email to the parent.
• Follow up with all affected employees.

More free resources and tools to help you be successful can be found at www.theprivateschoolleader.com/resources