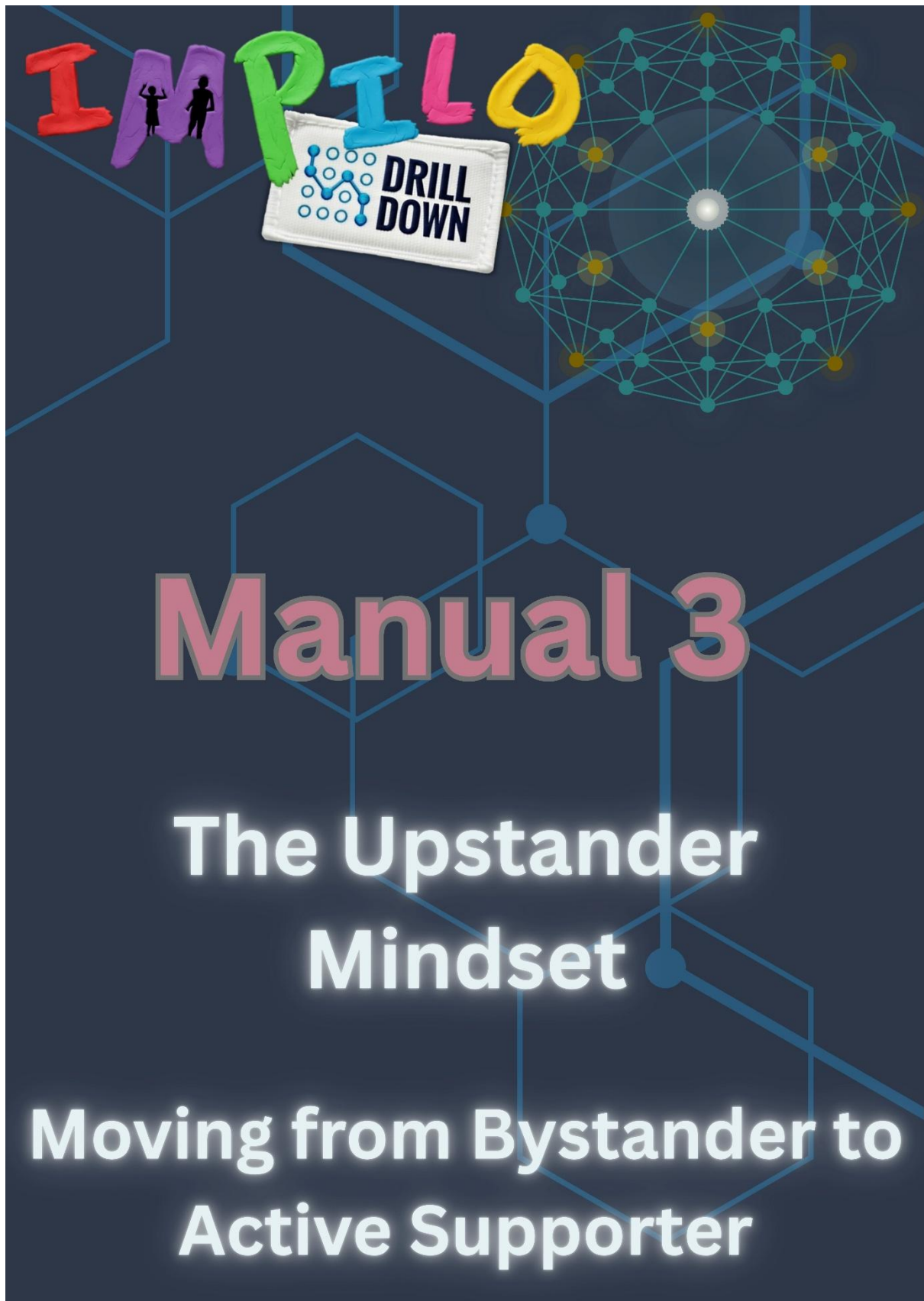




Module 3

PRACTICAL SKILLS FOR SAFER WORKPLACES AND STRONGER FAMILIES



SECTION 1: DESCRIPTION OF THE MODULE'S FOCUS

In this module, you will explore the powerful shift from being a silent bystander to becoming a confident, values-driven Upstander in your daily banking work. You will examine common reasons why people stay silent in the face of GBV, bullying, or coercive control, and learn practical mindset tools to move from hesitation to safe, proportionate action. Through realistic banking examples, you will discover how small, everyday choices can strengthen psychological safety for colleagues, protect team performance, and contribute to safer families and communities.

HOW THIS MODULE BUILDS ON PREVIOUS LEARNING AND CONNECTS TO THE OVERALL PROGRAMME

This module builds directly on the foundation laid in Modules 1 and 2. Having learned to recognise the dynamics of GBV, bullying and coercive control (Module 1) and to understand and actively build psychological safety in teams (Module 2), you are now ready to translate awareness and safety into personal responsibility and action. It forms a critical bridge in the overall 12-module programme, moving you from observation and team environment skills into the practical heart of bystander intervention. By developing an Upstander Mindset here, you will be better prepared for the disclosure response skills in Modules 4 and 5, the bullying tools in Module 6, and the leadership and culture-building work in later modules — all while contributing to the programme's goal of creating safer workplaces and stronger families across South African banking.

BRIEF NOTE ON THE FIVE VIDEOS AND HOW THE MANUAL SUPPORTS THEM

The five videos in this module bring the Upstander Mindset to life: Video 1 explores why people stay silent; Video 2 introduces the mindset shift; Video 3 covers safe and proportionate responses; Video 4 helps you choose the right approach for the situation; and Video 5 encourages you to become an everyday Upstander. This manual supports the videos by providing expanded explanations, additional banking scenarios, ready-to-use scripts and phrases aligned with the 5 D's Framework, CBT/NLP/Mindfulness tools, reflection prompts, and quick-reference job aids so you can immediately apply what you learn in your branch, call centre, or back-office role.

SECTION 2: LEARNING OBJECTIVES

By the end of this module, you will be able to:

KNOWLEDGE

- Clearly explain the common fears and beliefs that keep people silent in banking environments when witnessing GBV, bullying, or coercive control.
- Describe the key elements of an Upstander Mindset and how it differs from a passive bystander approach.
- Identify different levels of safe and proportionate intervention using the 5 D's Framework (Distract, Delegate, Document, Delay, Direct) in various banking contexts.

SKILLS

- Apply simple CBT-style reframing techniques to shift unhelpful thoughts (such as “It’s not my place” or “I might make it worse”) into values-based Upstander responses.
- Choose and use appropriate, context-specific intervention strategies, including ready-to-use phrases aligned with the 5 D's Framework.
- Demonstrate basic NLP rapport-building language and mindfulness grounding techniques to stay calm and resourceful before, during, and after supportive actions.

ATTITUDES / BEHAVIOURS

- Adopt a personal commitment to becoming an everyday Upstander, recognising your role in creating psychologically safe teams and protecting colleagues and families.
- Approach potential intervention situations with greater confidence, courage, and cultural sensitivity, honouring the diverse realities of South African banking colleagues while upholding respect, dignity, and collective responsibility.
- Model hopeful, values-driven behaviour that contributes to breaking intergenerational patterns of harm and strengthening safer workplaces and communities.

SECTION 3: KEY CONCEPTS SUMMARY

CORE CONCEPTS COVERED ACROSS THE FIVE VIDEOS

This module focuses on moving from passive silence to active, safe support. Here is a concise summary of the core concepts across the five videos:

- **Why People Stay Silent:** Common barriers such as fear of making things worse, concern about overstepping, respect for hierarchy, or victim-blaming thoughts often stop well-intentioned colleagues from acting. Recognising these helps you address them constructively.
- **The Upstander Mindset Shift:** An Upstander is someone who chooses values-based action over silence. This mindset uses gentle CBT reframing (e.g., changing “It’s not my business” to “Keeping our team safe is everyone’s responsibility”) to build courage and clarity.
- **Safe and Proportionate Responses:** Not every situation requires direct confrontation. The 5 D's Framework (Distract, Delegate, Document, Delay, Direct) gives you flexible, low-to-high intensity options that match the risk level and your role.

- **Choosing Your Approach:** Effective intervention depends on context — your position, the situation’s severity, and cultural dynamics. Mindfulness grounding helps you pause, assess, and respond thoughtfully.
- **Becoming an Everyday Upstander:** Small, consistent actions create lasting cultural change. This is about personal commitment and modelling respectful behaviour that strengthens teams and families.

KEY DEFINITIONS AND PRINCIPLES

- **Bystander:** Someone who witnesses harmful behaviour but does not intervene.
- **Upstander:** A colleague who takes safe, supportive action to challenge harm and protect others — guided by respect, dignity, and team wellbeing.
- **5 D’s Framework:** A practical, evidence-based tool for intervention:
 - **Distract:** Indirectly interrupt the situation.
 - **Delegate:** Bring in someone better positioned to help.
 - **Document:** Record facts for later follow-up.
 - **Delay:** Check in privately after the moment.
 - **Direct:** Calmly address the behaviour when safe.

These concepts work together to empower you to act with confidence while honouring South Africa’s diverse banking workforce and the values of respect and family protection shared across our cultures.

[Check course reference and credits document for more information about the 5 D’s and supporting links.](#)

SECTION 4: PRACTICAL TOOLS & SCRIPTS

You now have the mindset foundation — here are the practical, ready-to-use tools you can apply immediately in your banking role. These are designed to feel natural, respectful, and safe across different levels, teams, and cultural contexts in our diverse South African banking environment.

DECISION FRAMEWORK: CHOOSING YOUR UPSTANDER RESPONSE (5 D'S QUICK GUIDE)

1. **Pause & Ground** (Mindfulness): Take one calm breath. Ask yourself: “What do I notice? How can I keep this safe?”
2. **Assess the Situation**: What is the risk level? What is my role? Is anyone in immediate distress?
3. **Choose a D**: Start with lower-intensity options (Distract or Delegate) if unsure. Move to Direct only when safe.
4. **Act & Follow Up**: Use a simple phrase, then check in later if appropriate (Delay).
5. **Reflect**: Afterwards, notice what worked and reframe any unhelpful thoughts.

CBT THOUGHT REFRAME TOOL – “FROM HESITATION TO UPSTANDER”

Try This (quick self-talk anchor):

Unhelpful Thought → Helpful Upstander Reframe “It’s not my place” → “Protecting our team’s dignity is everyone’s responsibility.” “I might make it worse” → “A small, respectful action can create safety.” “They will handle it themselves” → “My support can strengthen them and our team.”

NLP Self-Anchor Phrase (say quietly before acting):

“I am calm, clear, and acting from respect.”

READY-TO-USE SCRIPTS & PHRASES

“You Can Say” – Distract

- “Hey, let’s quickly check that client file before the meeting starts.” (shifts focus)
- “Team, the system is showing a queue building — can we jump on that?”

“You Can Say” – Delegate

- “I’ve noticed this conversation — I’m going to bring our team leader in to support.”
- “Let me connect you with someone who can help with this properly.”

“You Can Say” – Document (privately) Make a quick factual note: “Date/time, what I observed, who was involved, impact on team/customer.”

“You Can Say” – Delay (Follow-up)

- “I saw things got a bit heated earlier. Are you okay? I’m here if you want to talk.”
- “That didn’t sit right with me. How are you feeling now?”

“You Can Say” – Direct (when safe and appropriate)

- “That comment crosses our team standards of respect. Let’s keep things professional.”
- “I value everyone’s contribution here — let’s speak to each other with respect.”

EVERYDAY UPSTANDER CONVERSATION STARTERS

- “I’ve been thinking about how we can look out for each other more as a team...”
- “That situation reminded me how important it is to speak up safely.”

MINDFULNESS GROUNDING TOOL (20–30 SECONDS, USABLE AT YOUR DESK OR BETWEEN CALLS):

5-4-3-2-1: Name 5 things you see, 4 you can touch, 3 you hear, 2 you smell, 1 you taste. Then breathe and choose your next small action.

These tools are flexible — adapt the language to feel natural in your cultural context while staying respectful and professional. Practise one small phrase this week. You are already making a difference by choosing to build this skill.

SECTION 5: EXPANDED SCENARIO LIBRARY

Here are six realistic banking scenarios that go beyond the videos. Each one reflects the diverse South African banking workforce and different workplace settings. Use these to practise applying the Upstander Mindset and 5 D’s Framework.

SCENARIO 1: BRANCH COUNTER (FRONTLINE – JUNIOR LEVEL)

Context: A busy branch in Rustenburg. A junior Black African female teller is being spoken to dismissively by a senior Coloured male colleague in front of customers.

What Happened: The senior colleague says, “You always mess this up — are you even paying attention?” loud enough for customers to hear. The teller looks embarrassed.

Possible Responses:

- Less effective: Staying silent or laughing it off to avoid tension.
- Effective: Using Distract or Direct to protect dignity.

Recommended Actions & Language:

You (as a nearby Black African female colleague) can say: “Let’s quickly sort the client’s query together so we can keep things moving smoothly.” (Distract) Or, privately later (Delay): “I noticed that comment at the counter. Are you okay? That didn’t sound respectful.” This supports the teller and models team standards.

SCENARIO 2: CALL CENTRE POD (REMOTE PRESSURE)

Context: High-volume call centre in Johannesburg. A junior Indian South African male agent receives repeated undermining comments from a middle manager during team huddle.

What Happened: Manager (White female) says, “Some people just can’t handle the targets — maybe this isn’t for you.”

Possible Responses:

- Less effective: Ignoring it or agreeing to stay in favour.
- Effective: Delegate or Document for follow-up.

Recommended Actions & Language:

Delegate by saying to the team leader: “I’m concerned about the feedback given in the huddle — it affected team morale.” Later, use Delay: “That huddle comment seemed tough. How are you holding up?” This builds psychological safety without overstepping.

SCENARIO 3: TEAM MEETING (OPEN-PLAN OFFICE)

Context: Hybrid team meeting with mixed levels. A junior Black African male staff member is repeatedly interrupted and excluded by a senior Coloured female colleague.

What Happened: Ideas are dismissed with “That won’t work” without discussion, creating visible discomfort.

Possible Responses:

- Less effective: Changing the subject awkwardly or remaining silent.
- Effective: Direct (if safe) or Distract.

Recommended Actions & Language:

You (middle manager, Black African female) can say: “I’d like to hear the full idea — let’s give everyone space to contribute. That’s how we get the best results.” (Direct + team norm reminder). This reinforces inclusive behaviour.

SCENARIO 4: HYBRID MEETING (VIRTUAL/REMOTE)

Context: Microsoft Teams meeting with branch and head office staff. A junior Tsonga female employee’s screen share is mocked subtly by a senior Afrikaner male executive.

What Happened: Executive comments, “This looks a bit basic — we need more professional standards here.”

Possible Responses:

- Less effective: Pretending not to notice or defending aggressively.
- Effective: Delegate to HR or use Delay.

Recommended Actions & Language:

Privately message the affected colleague (Delay): “I saw what happened in the meeting. That comment wasn’t fair. Are you alright?” Then Delegate upward if needed. This protects the junior staff member and addresses power dynamics respectfully.

SCENARIO 5: BACK-OFFICE SUPPORT TEAM

Context: Quiet back-office area. Ongoing low-level bullying where a middle manager (Indian South African male) excludes a junior Coloured female colleague from team lunches and information.

What Happened: She is left out of key updates, affecting her performance.

Possible Responses:

- Less effective: Gossiping about it.
- Effective: Document + Delegate.

Recommended Actions & Language:

Document facts, then say to the manager (if appropriate) or escalate: “I’ve noticed [colleague] isn’t getting the same updates — how can we make sure the whole team is included?” This promotes fairness.

SCENARIO 6: MIXED BRANCH & CALL CENTRE CROSSOVER

Context: Shift handover between branch and call centre teams. A senior Black African male team leader makes coercive jokes about a junior Cape Malay female staff member’s personal life.

What Happened: Jokes cause visible unease among the team.

Possible Responses:

- Less effective: Joining in to fit in.
- Effective: Distract + later Direct.

Recommended Actions & Language:

Distract: “Let’s focus on the handover points so everyone’s set for the shift.” Later (Delay): “Those comments made things uncomfortable. We’re stronger when we keep things professional and respectful.”

Reflection Tip: After reading each scenario, ask yourself: “Which D would I use here, and what would my Upstander phrase be?” Practise these out loud — small actions build confidence and safer teams.

SECTION 6: APPLICATION & REFLECTION

You have explored the Upstander Mindset — now is the time to make it personal and practical. These reflection activities are designed to help you integrate the learning gently and confidently into your daily banking work.

PAUSE AND CONSIDER

- What is one belief or fear that has held you back from speaking up in the past? How might a small CBT reframe change that thought into an Upstander action?
- In which situations do you feel safest taking action, and why? What small step could increase your confidence in other moments?

PERSONAL APPLICATION QUESTIONS

1. Think of a recent situation at work (branch, call centre, meeting, or hybrid) where you noticed something that didn't feel right. Which of the 5 D's could you have used, and what exact phrase might you have said?
2. What is one small, everyday Upstander action you can commit to this week that aligns with your values and role?
3. How can using a quick mindfulness grounding technique (like 5-4-3-2-1) help you stay calm and present the next time you witness concerning behaviour?
4. In what way does becoming a more active Upstander support not only your colleagues but also your own family and community?

TEAM DISCUSSION STARTERS (FOR MANAGERS AND TEAM MEETINGS)

- “What does being an Upstander look like in our team? Let's share one small action each of us can take to strengthen psychological safety.”
- “Which of the 5 D's feels most comfortable for you right now, and how can we support each other to use them safely?”
- “How do we want to handle situations where we notice someone being excluded or spoken to disrespectfully? What team norms can we agree on?”
- “Share a time when someone's supportive action made a positive difference for you. How can we create more of those moments?”

Take a moment after these reflections to notice what feels empowering. You are already contributing to a culture where people feel seen, safe, and supported. Small consistent actions create big change — for your team, your workplace, and the families connected to it. Well done for investing in this growth.

SECTION 7: QUICK REFERENCE TOOLS

UPSTANDER MINDSET POCKET GUIDE (MODULE 3)

YOUR QUICK 5 D'S DECISION TREE

1. **Pause** → Take one breath (Mindfulness grounding).
2. **Assess** → Risk level? My role? Immediate safety?
3. **Choose:**
 - Low risk / Indirect → **Distract** or **Delegate**
 - Evidence needed → **Document**
 - After the moment → **Delay** (check in)
 - Safe & clear → **Direct**

KEY PHRASES YOU CAN USE

- **Distract:** “Let’s quickly check that client file...”
- **Delegate:** “I’m going to bring our team leader in to support.”
- **Document:** Note facts privately (who, what, when, impact).
- **Delay:** “I noticed things got tense earlier. Are you okay?”
- **Direct:** “That comment crosses our team standards of respect.”

CBT QUICK REFRAME CARD

Unhelpful Thought → Upstander Reframe

“It’s not my place” → “Team safety is everyone’s responsibility.”

“I might make it worse” → “A respectful action creates more safety.”

“They’ll sort it out” → “My support can strengthen us all.”

MINDFULNESS GROUNDING TIP (30 SECONDS)

5-4-3-2-1:

5 things you see → 4 you can touch → 3 you hear → 2 you smell → 1 you taste. Then anchor: “I am calm, clear, and acting with respect.”

DAILY UPSTANDER COMMITMENT

Today I will:

- ☐ Notice one opportunity to support a colleague
- ☐ Use one 5 D’s strategy
- ☐ Practise one positive reframe
- ☐ End the day with one grateful reflection on team safety

Reminder: Small, consistent actions build safer workplaces and stronger families. You have the power to make a difference — start with one step today.

(Print this page as a handy one-pager or laminate for your desk. Use the programme colours: Deep Navy headings, Calming Teal for tools, Warm Purple accents for key actions.)

SECTION 8: RESOURCES & SIGNPOSTING

INTERNAL BANK RESOURCES

- Employee Assistance Programme (EAP) – Confidential counselling and support (available 24/7 via your bank’s internal number or app).
- Harassment and GBV Policy – Refer to your bank’s latest policy document on the intranet for reporting procedures.



- Reporting Channels – Speak to your line manager, HR Business Partner, or use the anonymous whistle-blower hotline.
- Wellbeing and Psychological Safety Resources – Check your learning portal for related modules on mental health and team culture.

EXTERNAL SUPPORT

- TEARS Foundation: 0800 121 777 (24-hour helpline for GBV support)
- National GBV Command Centre: 0800 428 428
- Lifeline South Africa: 0861 322 322
- Local counselling services through your medical aid or community clinics.

RELATED PROGRAMME RESOURCES

- Module 2: Building Psychological Safety in Banking Teams (foundation for this mindset work)
- Module 4 & 5: Responding to Disclosures – Core Principles and Support, Refer & Follow Through
- Module 6: Practical Tools for Addressing Bullying & Low-Level Harassment
- Module 11: Protecting Yourself & Your Colleagues – Self-Care, Boundaries & Vicarious Resilience

ENCOURAGING CLOSING MESSAGE

You have taken an important step by developing your Upstander Mindset. Every time you choose to notice, support, or speak up safely, you help create workplaces where colleagues feel valued and families feel stronger. You are not expected to fix everything — your small, consistent actions matter. Thank you for being part of building safer, more respectful banking teams across South Africa. Keep practising these tools, look after yourself, and know that you are making a real difference.

You've got this.

