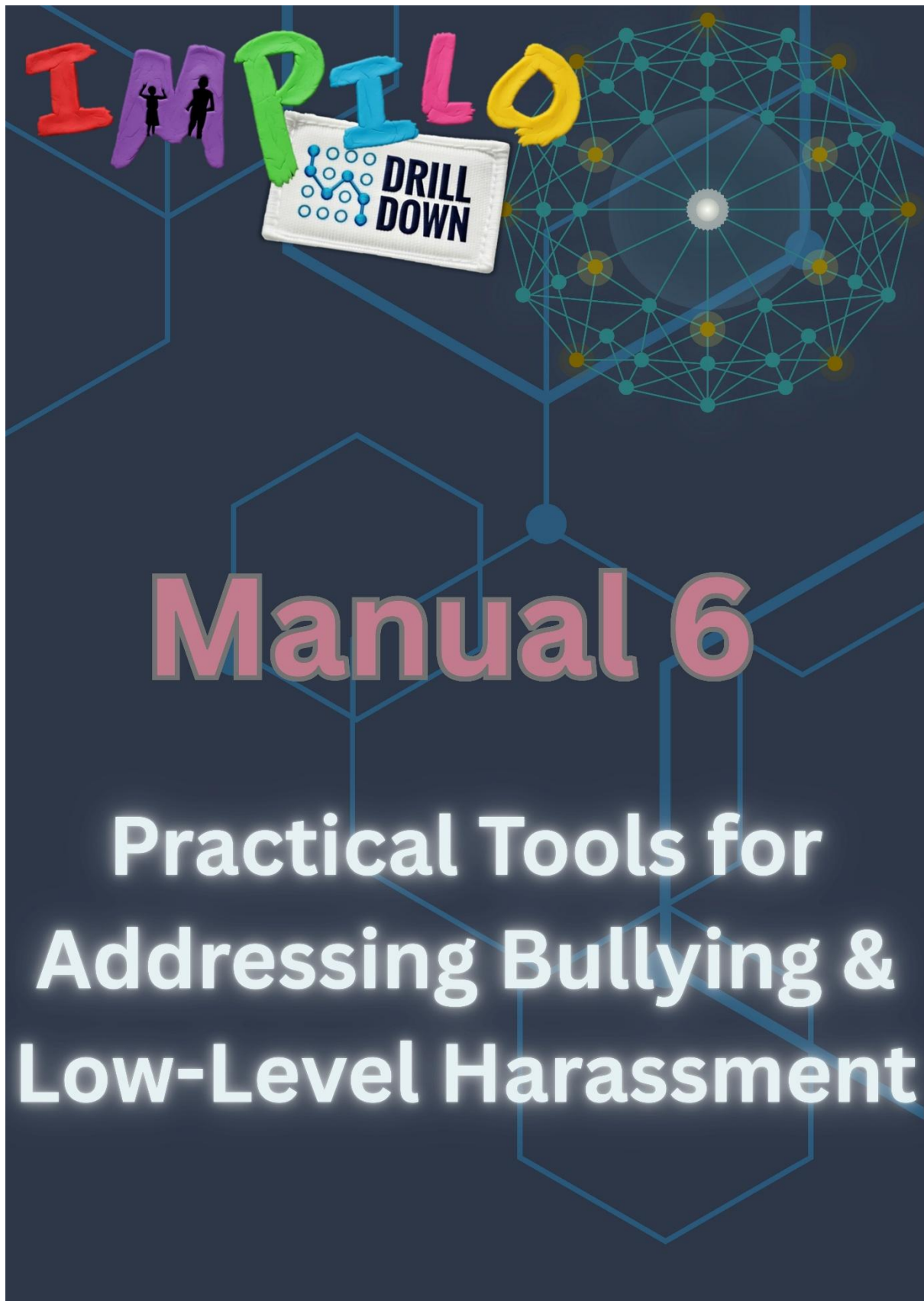




Module 6

PRACTICAL SKILLS FOR SAFER WORKPLACES AND STRONGER FAMILIES



SECTION 1: DESCRIPTION OF THE MODULE'S FOCUS

This module equips you with clear, practical tools to safely and effectively address bullying and low-level harassment in your daily banking work. You will learn to distinguish bullying from normal conflict, use graduated response options including the 5 D's Framework (Distract, Delegate, Document, Delay, Direct), apply "I Noticed" language, escalate appropriately when needed, and document incidents factually and professionally. Through realistic banking scenarios across branches, call centres, back-offices and hybrid settings, you will build the confidence to intervene as a Skilled Upstander Colleague while maintaining psychological safety for yourself and your team.

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

This module builds directly on the foundational awareness and mindset developed in Modules 1–5. Having learned to recognise harmful dynamics (Module 1), build psychological safety (Module 2), shift into an Upstander mindset (Module 3), and respond supportively to disclosures (Modules 4–5), you are now ready to move from understanding to actionable intervention in lower-level situations before they escalate. It forms a critical bridge in the overall 12-module programme by translating early recognition and supportive response skills into everyday prevention and early intervention tools that strengthen team norms, reduce harm, and contribute to safer workplaces and stronger families.

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

The module is supported by five 5-minute videos that introduce concepts, demonstrate skills in context, and guide reflection. This PDF Training Manual extends the videos with deeper scenario libraries, ready-to-use scripts and phrasing alternatives (including culturally respectful options), step-by-step decision guides, CBT/NLP/Mindfulness tools, expanded reflection prompts, and quick-reference job aids so you can immediately apply what you learn in your specific banking role.

SECTION 2: LEARNING OBJECTIVES

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

KNOWLEDGE

- Clearly distinguish between bullying, low-level harassment, and normal workplace conflict using realistic banking examples.
- Identify the 5 D's Framework (Distract, Delegate, Document, Delay, Direct) and explain when each strategy is most appropriate in branch, call centre, back-office, and hybrid banking environments.

SKILLS

- Apply graduated response options safely and proportionately according to the level of risk and your role.
- Use clear, respectful "I Noticed" language and other practical scripts to address bullying and low-level harassment in the moment.
- Document incidents factually and professionally without drama, and follow appropriate escalation pathways for your position.
- Integrate simple CBT reframing, NLP rapport-building phrasing, and brief mindfulness grounding techniques to remain calm and confident while intervening or supporting colleagues.

ATTITUDES / BEHAVIOURS

- Adopt an empowered Upstander mindset that views early intervention in bullying as a natural part of protecting team psychological safety, colleague wellbeing, and family life.
- Demonstrate cultural sensitivity and respect for South Africa's diverse banking workforce (aligned with BASA 2023 demographics) when choosing and delivering responses.
- Commit to modelling respectful behaviour and contributing to collective team accountability in your daily work.

SECTION 3: KEY CONCEPTS SUMMARY

CORE CONCEPTS COVERED ACROSS THE FIVE VIDEOS

This module focuses on turning awareness into action by giving you practical, low-risk tools to address bullying and low-level harassment before they escalate. The core concepts are organised around the five videos and reinforced through the 5 D's Framework.

KEY CONCEPTS

- **Bullying vs Normal Conflict** Bullying is repeated, intentional behaviour that causes harm or distress and involves a power imbalance. Normal conflict is a one-off disagreement where both parties feel able to express themselves safely. Recognising this difference helps you respond appropriately rather than over- or under-reacting. (Video 1)
- **Graduated Response Options (The 5 Ds Framework)** A simple, evidence-based set of strategies — Distract, Delegate, Document, Delay, and Direct — that let you choose the safest and most effective way to intervene depending on the situation and your role. (Video 2)
- **"I Noticed" Language** A powerful, non-confrontational way to name harmful behaviour: "I noticed that comment made [colleague] uncomfortable..." This approach focuses on observed facts and impact rather than accusation. (Video 3)
- **When and How to Escalate** Clear pathways for involving team leaders, HR, or other appropriate parties when a situation is beyond your safe scope. Escalation protects everyone and demonstrates organisational care. (Video 4)
- **Documenting Without Drama** Recording facts objectively (who, what, when, where, observed impact) in a timely, professional manner. Good documentation supports fair processes and creates a safer team culture. (Video 5)

KEY DEFINITIONS AND PRINCIPLES

- Early, respectful intervention prevents harm and builds psychological safety.
- You can contribute to a safer workplace at any level using small, proportionate actions.
- Self-regulation (brief mindfulness grounding, CBT reframing of thoughts like "It's not my place", and NLP rapport language) helps you stay calm and effective.
- Responses must honour South Africa's diverse banking workforce and family-oriented values while maintaining professional standards.

SECTION 4: PRACTICAL TOOLS & SCRIPTS

This is the heart of the module — practical, ready-to-use tools you can apply immediately in your banking role. All scripts are written in respectful, professional language suitable for South Africa's diverse workforce and can be adapted to your context while staying true to the principles of psychological safety and cultural respect.

1. QUICK DECISION FRAMEWORK: CHOOSE YOUR RESPONSE

1. Pause and ground yourself (see Mindfulness tool below).
2. Name what you see: Is it bullying (repeated, power imbalance, harm) or normal conflict?
3. Assess risk and your role.
4. Choose the most appropriate 5 D strategy.
5. Use "I Noticed" language where safe.
6. Document if needed and escalate appropriately.
7. Follow up with care.

2. THE 5 D'S FRAMEWORK – READY-TO-USE APPLICATIONS

Distract – Interrupt indirectly to create space.

You Can Say: "Sorry to interrupt, but the branch manager asked me to check on the queue – can we continue this later?"

Delegate – Bring in someone with more authority.

You Can Say: "I've noticed this is affecting the team's focus. I think [Team Leader/HR] should be involved – shall I ask them to join us?"

Document – Record facts objectively.

You Can Say (to yourself or colleague): "I'm noting the key details so we can address this properly."

Delay – Check in privately afterwards.

You Can Say: "I saw what happened earlier. Are you okay? I'm here if you want to talk."

Direct – Address the behaviour calmly when safe.

You Can Say: "I noticed that comment made [colleague] uncomfortable. Let's keep our interactions respectful."

3. "I NOTICED" LANGUAGE SCRIPTS

Try This – Low-intensity opener:

"I noticed that the tone in that conversation became quite sharp. How can we keep things professional?"

Try This – Supporting the person affected:

“I noticed you seemed upset after that interaction. Would you like me to stay with you for a moment?”

Try This – Addressing a colleague privately:

“I noticed you raised your voice with the teller earlier. I’m concerned it affected the customer experience. Let’s find a better way to handle pressure.”

4. CBT / NLP / MINDFULNESS TOOLS FOR THE MOMENT

CBT Thought Reframe (before intervening):

Unhelpful thought: “It’s not my place – I might make it worse.” Helpful reframe: “As a team member, noticing and acting respectfully protects our whole team and their families. One small action can make a difference.”

NLP Anchoring for Calm (quick self-talk):

Before speaking, silently say: “I speak with respect and clarity for the safety of our team.” Take a steady breath and match your tone to a calm, confident state.

Mindfulness Grounding Technique (20–30 seconds):

Use the 5-4-3-2-1 method on the banking floor: 5 things you can see → 4 things you can touch → 3 things you can hear → 2 things you can smell → 1 thing you can taste. This brings you back to the present and helps you respond from a centred place.

5. ESCALATION AND DOCUMENTATION GUIDE

When to Escalate: If the behaviour continues, involves a power imbalance, or causes significant distress.

You Can Say to your manager: “I witnessed repeated comments that made a colleague uncomfortable. I’ve documented the details and would like your guidance on next steps.”

Simple Documentation Template (use in your notes or incident form):

- Date, time, location
- Names/roles of those involved
- What I observed (facts only)
- Impact noticed (e.g., colleague became quiet/withdrawn)
- Action I took

You Can Say when offering to document with the colleague: “Would it help if we write down what happened together? We’ll keep it factual and respectful.”

Reflection Prompt: Which of these tools feels most natural for your current role? Choose one situation this week where you can practise a single 5 D or “I Noticed” phrase.

These tools are designed to feel achievable for tellers, call centre agents, back-office staff, and leaders alike. Practise them in low-stakes moments so they become natural when it matters most. You are building a safer banking environment one respectful interaction at a time.

SECTION 5: EXPANDED SCENARIO LIBRARY

Here are six realistic banking scenarios that go beyond the videos. Each reflects the diversity of South African banking teams (BASA 2023) and common situations across different environments. Use these to rehearse your responses and build confidence.

SCENARIO 1: BRANCH COUNTER – REPEATED UNDERMINING (FRONTLINE)

Context: A busy branch in Rustenburg. Junior Black African female teller (Sipho, 24) is serving customers while a senior Coloured male colleague (Mark) repeatedly makes sarcastic comments about her speed in front of clients.

What happened: Mark says loudly, “Come on Sipho, we can’t afford another complaint today,” for the third time this week. Sipho looks embarrassed and her hands shake slightly.

Possible Responses:

- Less effective: Ignoring it or telling Sipho “Just ignore him” (dismisses the impact and misses the opportunity to model upstander behaviour).
- Effective: Use Distract or Direct with “I Noticed” language.

Recommended Language/Actions:

“I noticed those comments are making it harder for Sipho to focus on the customer. Let’s keep our support professional.” (Direct) Then privately to Sipho: “I saw what happened. Are you okay? I can cover your counter for a minute if you need a quick breather.” (Delay + support)

SCENARIO 2: CALL CENTRE – EXCLUSION AND GOSSIP (REMOTE/HIGH-VOLUME)

Context: Contact centre in Johannesburg. A team of mostly Black African and Indian South African agents. A middle-aged Black African female agent (Nomsa) is being excluded from team chats and hears colleagues whispering she “can’t handle the targets because of her home situation.”

What happened: During a shift overlap, two colleagues mock Nomsa’s accent and family responsibilities.

Possible Responses:

- Less effective: Joining in or staying silent out of fear of being next.
- Effective: Delegate or Document.

Recommended Language/Actions:

To the group (Distract): “Team, let’s focus on hitting our targets together – everyone’s contribution matters.” Later to team leader (Delegate): “I noticed some comments about Nomsa’s personal life that felt disrespectful. I’ve noted the details if you need them.”

SCENARIO 3: BACK-OFFICE TEAM MEETING – POWER IMBALANCE BULLYING

Context: Open-plan back-office in Cape Town. A senior White male manager criticises a junior Black female analyst (Thandi) harshly and repeatedly in front of the team, using phrases that undermine her competence.

What happened: The manager says, “This is basic stuff – if you can’t keep up, maybe this isn’t the place for you,” in the third consecutive meeting.

Possible Responses:

- Less effective: Public confrontation that escalates tension.
- Effective: Direct (if safe) or Delegate + Document.

Recommended Language/Actions:

“I noticed the feedback to Thandi was quite harsh and may affect team morale. Let’s find a way to give constructive input privately.” (Direct, to manager after meeting) Document facts and escalate to HR if pattern continues.

SCENARIO 4: HYBRID MEETING – UNDERMINING IN VIRTUAL SETTING

Context: Hybrid team meeting with participants from Durban and Sandton offices. A middle manager (Indian South African male) repeatedly interrupts and takes credit for ideas from a junior Coloured female colleague working remotely.

What happened: Colleague shares an idea; manager cuts her off saying, “That won’t work – I’ve already thought of something better.” This has happened multiple times.

Possible Responses:

- Less effective: Saying nothing to avoid “rocking the boat.”
- Effective: Distract during meeting + Delay follow-up.

Recommended Language/Actions:

During meeting (Distract): “That’s an interesting point from Lerato – let’s hear her out fully.” Afterwards (Delay): “Lerato, I noticed your ideas were being interrupted. Your input is valuable – would you like me to raise it with the manager?”

SCENARIO 5: BRANCH BACK-ROOM – LOW-LEVEL HARASSMENT

Context: Quiet moment in the branch strong-room area. A male colleague makes repeated inappropriate jokes about a female colleague’s appearance and personal life.

What happened: Comments like “You’d smile more if you had a real man at home” directed at a young Black African female colleague.

Possible Responses:

- Less effective: Laughing it off or telling her to “toughen up.”
- Effective: Direct with clear boundary + Document.

Recommended Language/Actions:

“I noticed those jokes are disrespectful and make [colleague] uncomfortable. We keep our workplace professional and safe.” (Direct) Document the incident with date, exact words (paraphrased factually), and witnesses.

SCENARIO 6: MIXED TEAM – ESCALATING EXCLUSION

Context: Hybrid performance review preparation meeting involving junior and middle management. A group of colleagues systematically excludes one Black African male team member from key discussions, affecting his development opportunities.

Possible Responses:

- Less effective: Waiting for someone senior to act.
- Effective: Delegate to HR or senior leader + support the colleague.

Recommended Language/Actions:

“I’ve noticed [colleague] is being left out of important conversations. This affects team fairness and performance. I recommend we include everyone fully.” Private check-in: “I see what’s happening and I’m here to support you. Let’s document this together if you want to escalate.”

Reflection: After reading each scenario, pause and visualise yourself using one 5 D strategy and an “I Noticed” phrase. Which scenario feels most like situations you encounter? Practising these responses helps create the safer team culture we all deserve.

SECTION 6: APPLICATION & REFLECTION

PAUSE AND CONSIDER

Take a gentle breath and ground yourself before reflecting. Remember: noticing these patterns and choosing small supportive actions is already an act of courage and care for your colleagues and their families.

REFLECTION PROMPTS

1. Which unhelpful thought (e.g., “It’s not my place” or “I might make things worse”) has held you back from addressing bullying in the past? Using the CBT reframe from this module, how could you gently shift that thought to support a more helpful response?
2. Think of a recent situation where you witnessed low-level harassment or exclusion. Which of the 5 Ds feels most doable for you in that context, and why?
3. How does addressing bullying in the workplace connect to protecting family wellbeing and breaking intergenerational patterns of harm? What small change in your own behaviour could strengthen this protective factor?

PERSONAL APPLICATION QUESTIONS

- What is one specific situation in your branch, call centre, back-office, or hybrid environment where you could practise an “I Noticed” phrase or one of the 5 D’s this week?
- Which mindfulness grounding technique or NLP self-talk anchor will you use to stay calm and centred before responding?
- How will you document an incident factually if needed, while maintaining respect for everyone involved?

TEAM DISCUSSION STARTERS (FOR MANAGERS AND TEAM MEETINGS)

1. “In our team, what does respectful challenge or feedback look like versus bullying? How can we support each other when we notice the difference?”
2. “Which of the 5 D’s strategies could we agree to use as a team norm when we see low-level harassment or exclusion?”
3. “How can we create space for everyone — across all roles, backgrounds, and management levels — to feel safe speaking up or asking for support?”
4. “What one practical ritual could we introduce (e.g., a quick check-in phrase or appreciation moment) to reinforce our commitment to a safer, more supportive team culture?”

End your reflection with this empowering self-statement:

“I am a Skilled Upstander Colleague. By choosing respectful action, I help create safer workplaces and stronger families — one interaction at a time.”

You do not need to be perfect. Every small, values-based step you take matters. Well done for investing in these skills.

SECTION 7: QUICK REFERENCE TOOLS

Module 6 Pocket Guide: Addressing Bullying & Low-Level Harassment

THE 5 D’S DECISION FLOW

1. **Pause & Ground** → Take one calm breath (5-4-3-2-1 if needed).
2. **Assess**: Is it repeated + power imbalance + harm? → Bullying → Act.
3. Choose the safest D:
 - **Distract** – Low risk, redirect attention.
 - **Delegate** – Bring in help.
 - **Document** – Record facts.
 - **Delay** – Follow up later.
 - **Direct** – Address calmly when safe.

KEY PHRASES – “I NOTICED” SCRIPTS

- “I noticed that comment made [name] uncomfortable. Let’s keep things respectful.”
- “I noticed the tone became quite sharp – how can we support each other better?”
- “I saw what happened. Are you okay? I’m here if you need to talk.”
- “I noticed this is affecting the team. I think we should involve [manager/HR].”

QUICK DOCUMENTATION CHECKLIST

- Date / Time / Location
- Names & roles of people involved
- What I observed (facts only, no opinions)
- Impact noticed on colleague/team
- Action I took
- Any witnesses

ESCALATION PATHWAY

Low-level → Try 5 D's yourself → Pattern continues or high distress → Document + Speak to Team Leader → Still unresolved → HR / Formal channel.

SELF-CARE & GROUNDING TIPS (USE ANYTIME)

1-Minute Reset:

5 things you see → 4 you can touch → 3 you hear → 2 you smell → 1 you taste.

CBT Quick Reframe:

Unhelpful: "It's not my place." Helpful: "Speaking up respectfully protects our team and families."

NLP Anchor: Silently repeat: "I speak with clarity and care for team safety."

After an Incident Reminder:

You did what you could with the information and safety you had. Check in with yourself or a trusted colleague. Access EAP support if the interaction lingers.

Takeaway Card (Cut-out friendly)

You are a Skilled Upstander.

Small respectful actions today create safer banking workplaces and stronger families tomorrow.

Keep this page handy in your workspace or digital notes. Practise one tool this week.

SECTION 8: RESOURCES & SIGNPOSTING

INTERNAL BANK RESOURCES

- Employee Assistance Programme (EAP) – Confidential counselling and support (available 24/7 – check your bank's intranet for contact details).
- Harassment / GBV / Bullying Policy – Refer to your bank's Code of Conduct and reporting procedures.
- HR / People & Culture / Wellbeing Team – For guidance, escalation, or team support.



- Internal Reporting Channels – Use your bank’s confidential hotline, online portal, or speak directly to your line manager or designated officer.

EXTERNAL SUPPORT

- TEARS Foundation: 0800 871 888 (24-hour helpline for GBV support and counselling).
- National GBV Command Centre: 0800 428 428 (24 hours).
- Lifeline South Africa: 0861 322 322 (emotional support).
- Local community counselling services and faith-based support structures (many banks maintain partnerships).

RELATED PROGRAMME RESOURCES

- Module 2: Building Psychological Safety in Banking Teams
- Module 3: The Upstander Mindset – From Bystander to Active Supporter
- Module 4 & 5: Responding to Disclosures
- Module 7: Leadership in Action
- Module 10: Creating Team Norms & Collective Accountability
- Module 11: Protecting Yourself & Your Colleagues – Self-Care, Boundaries & Vicarious Resilience

ENCOURAGING CLOSING MESSAGE

You now have practical tools to recognise bullying, respond safely, and contribute to a respectful team culture. Every time you choose to act as a Skilled Upstander Colleague — even in small ways — you help create safer workplaces that protect your colleagues, their families, and the next generation.

You are not expected to fix everything, only to do what is safe and right in the moment. Your courage and care matter. Thank you for investing in these skills and for being part of building stronger, more supportive banking teams across South Africa.

Keep practising, stay grounded, and remember: together we create the change we want to see. Well done.

