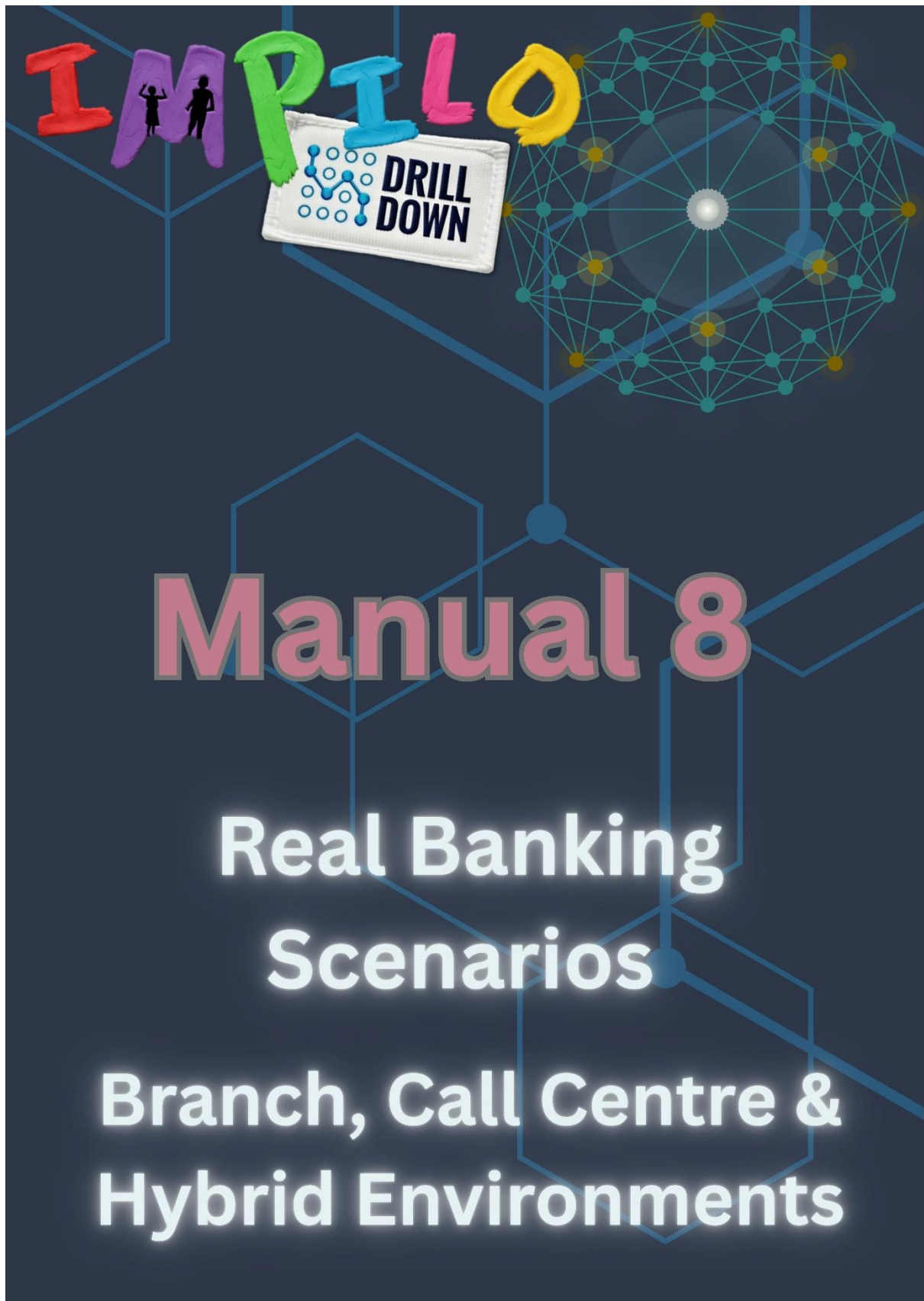




Module 8

PRACTICAL SKILLS FOR SAFER WORKPLACES AND STRONGER FAMILIES



SECTION 1: DESCRIPTION OF THE MODULE'S FOCUS

In this module, you will apply the recognition, psychological safety, upstander mindset, disclosure response, and bullying intervention skills from earlier modules to realistic, high-pressure banking environments. Through authentic South African banking scenarios set in branches, contact centres, back-office teams, and hybrid meetings, you will practise adapting your responses to different contexts, roles, and risk levels while using the 5 Ds Framework (Distract, Delegate, Document, Delay, Direct) in ways that feel natural and safe. The focus is on building confidence to act effectively in the fast-paced, customer-facing, and team-dynamic realities of daily banking work.

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

This module builds directly on the foundational knowledge and skills developed in Modules 1–7. Having learned to recognise harmful dynamics, create psychological safety, shift into an upstander mindset, respond supportively to disclosures, address bullying, and understand leadership responsibilities, you now translate those principles into context-specific application. It connects to the overall programme by bridging individual skills with real-world team and organisational culture change, reinforcing how consistent, skilled upstander actions in everyday banking settings contribute to safer workplaces, stronger families, and collective accountability across all levels and demographics of the South African banking workforce.

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

The five videos in this module each present a different banking environment and demonstrate practical application of prior learning. Video 1 focuses on branch counter realities, Video 2 on call centre and remote pressures, Video 3 on back-office dynamics, Video 4 on hybrid meeting challenges, and Video 5 on adapting your approach across contexts. This manual supports the videos by providing expanded scenario libraries with additional examples, ready-to-use scripts and phrases tailored to each environment, CBT/NLP/Mindfulness tools for staying grounded and confident in the moment, reflection prompts for personal application, and quick-reference tools you can use immediately on the job.

SECTION 2: LEARNING OBJECTIVES

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

KNOWLEDGE

- Identify banking-specific triggers and dynamics of GBV, bullying, coercive control, and psychological safety risks unique to branch, call centre, back-office, and hybrid environments.
- Describe how the 5 Ds Framework (Distract, Delegate, Document, Delay, Direct) applies differently across various banking roles and settings.

SKILLS

- Adapt supportive upstander responses, disclosure listening skills, and bullying intervention techniques to realistic scenarios in high-pressure frontline, remote, and hybrid banking contexts.
- Use culturally respectful, role-appropriate language and the 5 Ds strategies to intervene safely and proportionately while maintaining professional standards.
- Apply brief uKukhula grounding, CBT reframing, and NLP rapport techniques to stay calm and regulated during challenging interactions.

ATTITUDES / BEHAVIOURS

- Demonstrate confidence in recognising and addressing harmful dynamics in diverse banking teams that reflect South Africa's banking workforce demographics.
- Commit to flexible, context-aware upstander actions that strengthen team psychological safety and support colleagues' family wellbeing.
- Actively contribute to a culture of collective accountability by modelling respectful, inclusive behaviour in branch, contact centre, and hybrid settings.

SECTION 3: KEY CONCEPTS SUMMARY

CORE CONCEPTS COVERED ACROSS THE FIVE VIDEOS

This module brings together the skills from earlier modules and shows how to apply them confidently in the real day-to-day environments of South African banking. Across the five videos you will explore how subtle and overt harmful dynamics appear in branch counters, call centres, back-office teams, and hybrid meetings, and how you can respond effectively while staying regulated and professional.

Core Concepts

- **Context Matters:** The same upstander principles look different depending on whether you are at a busy branch counter, in a high-volume call centre, supporting back-office colleagues, or participating in hybrid meetings. You will learn to read the environment and adapt your approach safely.
- **The 5 D's Framework in Action:**
 - **Distract** – Indirectly interrupt or redirect to create space (e.g., changing the subject during a tense customer interaction).
 - **Delegate** – Bring in the right person (manager, HR, or colleague) when direct action feels unsafe.

- **Document** – Record facts calmly for follow-up when needed.
- **Delay** – Check in privately with the affected colleague afterwards.
- **Direct** – Address the behaviour clearly and respectfully when it is safe to do so.
- **Psychological Safety Across Environments:** Small, consistent actions build trust and encourage open reporting even under pressure.
- **Cultural Responsiveness:** Responses honour South Africa’s diverse workforce (reflecting BASA 2023 demographics) and values such as respect (inhlonipho), family protection, and collective wellbeing.

SUPPORTING UKUKHULA TOOLS

- **CBT:** Notice and gently reframe thoughts like “It’s not my place here” into “I can contribute to team safety in this environment.”
- **NLP:** Use rapport-building language that matches the tone and context of the moment.
- **Mindfulness:** Quick grounding techniques (e.g., 5-4-3-2-1 or a calming breath) to stay present on the banking floor or during hybrid calls.

These core ideas will help you move from knowing what to do, to confidently doing it in the real banking moments that matter.

SECTION 4: PRACTICAL TOOLS & SCRIPTS

You now have the foundation — this section gives you ready-to-use tools and language you can apply immediately in branch, call centre, back-office, and hybrid banking environments. Practise these scripts and techniques so they feel natural when the moment arises.

DECISION FRAMEWORK: CHOOSING YOUR RESPONSE IN CONTEXT

1. **Pause & Ground** (10–20 seconds): Take one calming breath and notice the environment and risk level.
2. **Assess**: Is this low-level bullying, coercive control, or a disclosure? What is my role and safety?
3. **Choose a 5 D**: Distract (low risk), Delegate, Document, Delay, or Direct (when safe).
4. **Act** with respectful, culturally sensitive language.
5. **Follow Up** where appropriate and check in with yourself.

QUICK MINDFULNESS GROUNDING (UKUKHULA TOOL)

Try This – 5-4-3-2-1 on the Floor or Call:

Name 5 things you can see, 4 you can touch (e.g., desk, keyboard), 3 sounds, 2 deep breaths, 1 value (e.g., “I protect team dignity”). Use before or after any intervention.

CBT THOUGHT REFRAME ANCHOR

Unhelpful Thought: “In this busy branch/call centre it’s not my place.”

Helpful Reframe: “I am part of this team and small actions keep us all safer.”

Repeat as your personal anchor before responding.

READY-TO-USE SCRIPTS BY ENVIRONMENT

Branch Counter Scenarios

You Can Say (Distract): “Let’s focus on getting this customer sorted quickly — how can I help with the next step?”

You Can Say (Direct – low intensity): “I noticed that comment felt disrespectful. We treat each other with respect here.”

Call Centre / Remote Pressures

You Can Say (Delay – after a difficult call): “That sounded tough. How are you doing? I’m here if you want to talk for a minute.”

You Can Say (Delegate): “I’m concerned about what just happened on that call. Would you like me to loop in our team leader?”

Back-Office & Support Teams

You Can Say (Document + Delay): “I’ve noted what happened. Let’s check in privately after this deadline.”

You Can Say (Direct): “That approach is undermining the team. Let’s find a way that works for everyone.”

Hybrid Meeting Challenges

You Can Say (Distract): “Before we move on, can we hear from [name] on this point?”

You Can Say (Direct in chat or verbally): “I’d like us to keep the discussion respectful so everyone feels heard.”

NLP RAPPORT-BUILDING PHRASE BANK

- “I can see this is important to you...” (builds connection)
- “We’re on the same team here...” (reinforces collective safety)
- “Let’s handle this in a way that protects everyone involved.” (inclusive framing)

“YOU CAN SAY” – DISCLOSURE SUPPORT IN ANY ENVIRONMENT

“I’m really glad you trusted me with this. I believe you. Would it help if we quietly connect you with our EAP / TEARS support right now?”

SELF-CARE AFTER SUPPORTING A COLLEAGUE

NLP Self-Talk Anchor: “I did what I could with care. Now I release this and return to my own tasks grounded.”

Quick Reset: Stand up, stretch, drink water, and name one thing you handled well.

Print or save these pages as your pocket guide. The more you rehearse these scripts in your mind or with a trusted colleague, the more natural they become when a real situation arises. You’ve got this — your skilled upstander actions make a real difference in our banking teams and the families we all go home to.

SECTION 5: EXPANDED SCENARIO LIBRARY

Here are six realistic, expanded scenarios that go beyond the five videos. Each reflects the diversity of South African banking teams (BASA 2023 demographics) and common pressures in different environments. Use these to mentally rehearse your responses.

SCENARIO 1: BRANCH COUNTER (FRONTLINE – JUNIOR BLACK AFRICAN FEMALE TELLER)

Brief Context: Busy Friday afternoon in a Rustenburg branch. A senior Coloured male colleague repeatedly makes dismissive comments about a junior Black female teller’s speed in front of customers.

What Happened: The colleague says loudly, “You’re too slow today — customers are waiting because of you.” The teller looks embarrassed and withdrawn.

Possible Responses:

- Less effective: Ignoring it or telling the teller “Just work faster” (reinforces silence and shame).
- Effective: Use Distract or Direct to interrupt the pattern and protect dignity. **Recommended Language/Actions:** “Let’s keep things respectful in front of customers. [Name], you’re handling that queue well — I’ll assist with the next one.” (Distract + support). Follow up privately with the teller using Delay: “I noticed that comment. How are you feeling?”

SCENARIO 2: CALL CENTRE POD (HIGH-VOLUME – MIXED TEAM)

Brief Context: Late shift in a Johannesburg call centre. A middle-aged Indian South African team leader uses coercive language with a young Black African male agent who missed targets due to family issues.

What Happened: Leader says, “If you can’t handle your home problems, maybe this job isn’t for you.” The agent becomes quiet and anxious.

Possible Responses:

- Less effective: Saying nothing or joking it off (normalises coercive control).
- Effective: Delegate or Delay to support without overstepping. **Recommended Language/Actions:** “I can see this is a tough conversation. Would it help if we involve HR or EAP for support options?” (Delegate). Later (Delay): “That sounded heavy. I believe you’re doing your best. Let’s check in tomorrow.”

SCENARIO 3: BACK-OFFICE OPEN-PLAN TEAM

Brief Context: Cape Town back-office team with high workload. A White female senior staff member excludes a Basotho female colleague from key project updates.

What Happened: Repeatedly saying “We already covered this” while side-lining her input in team huddles.

Possible Responses:

- Less effective: Direct confrontation that escalates tension.
- Effective: Use Document + Direct calmly. **Recommended Language/Actions:** “I noticed [Name] hasn’t been looped in on the updates. Let’s make sure everyone has the full picture so we succeed together.” Document facts privately if pattern continues.

SCENARIO 4: HYBRID TEAM MEETING (VIRTUAL + IN-PERSON)

Brief Context: Mixed hybrid meeting with participants from Durban and Sandton. A senior Black African male manager undermines a junior Coloured female analyst’s presentation with sarcastic interruptions.

What Happened: “That idea is naive — we’ve tried it before.” Other participants stay silent.

Possible Responses:

- Less effective: Staying silent due to hierarchy.
- Effective: Distract or Direct in the moment. **Recommended Language/Actions:** “Let’s build on that point — [Name], can you share more details?” (Distract). Privately (Delay): “I appreciated your contribution. That interruption felt undermining. Are you okay?”

SCENARIO 5: BRANCH BACK-ROOM STAFF INTERACTION

Brief Context: After hours in a small branch. Two colleagues (Zulu male and Afrikaner female) engage in low-level bullying through repeated “jokes” about each other’s cultural practices.

What Happened: Comments create discomfort and tension affecting team morale.

Possible Responses:

- Less effective: Laughing along to fit in.
- Effective: Direct with team norm reminder. **Recommended Language/Actions:** “Those jokes cross our team standards of respect. Let’s keep things inclusive so everyone feels safe.” Follow with CBT reframe for yourself: “Speaking up protects the whole team.”

SCENARIO 6: CONTACT CENTRE ESCALATION TO MANAGER

Brief Context: High-pressure call centre during month-end. A team leader witnesses a disclosure of home-based GBV from a Tsonga female agent but responds awkwardly.

What Happened: The leader says “That’s personal, focus on your calls” before walking away.

Possible Responses:

- Less effective: Dismissing or minimising.
- Effective: Listen & Believe + warm referral. **Recommended Language/Actions:** “Thank you for sharing that with me. I believe you and I’m here to support you. Would you like me to help connect you with EAP or TEARS confidentially?” (Core disclosure response). Use grounding technique afterwards.

Review these scenarios regularly. Notice which 5 D and uKukhula tool fits best in each environment. Your consistent, skilled responses build the safer banking culture we all want.

SECTION 6: APPLICATION & REFLECTION

Take a moment to reflect on what you’ve learned in this module. These prompts are designed to help you integrate the skills into your daily banking work in ways that feel safe, realistic, and empowering for you and your colleagues.

PAUSE AND CONSIDER

- In which of the banking environments (branch, call centre, back-office, or hybrid) do you feel most confident applying the 5 Ds right now, and where might you need more practice?
- When have you noticed a moment where silence or hesitation allowed a harmful dynamic to continue? What small upstander action could have changed the outcome?

PERSONAL REFLECTION PROMPTS

- Think of a recent interaction in your own role. What unhelpful thought (e.g., “It’s not my place in this busy environment”) came up for you? How might you gently reframe it using the CBT approach?
- Which uKukhula tool (grounding breath, rapport language, or self-talk anchor) feels most useful for staying regulated during high-pressure moments in your specific banking setting?

PERSONAL APPLICATION QUESTIONS

- What is one situation in your branch, call centre, back-office, or hybrid work that you could apply a 5 D strategy to this week?

- How can you adapt one of the recommended scripts or phrases to better fit the cultural and team dynamics in your immediate work environment?
- What is one small, consistent action you will take to model psychological safety for your colleagues and contribute to safer family outcomes outside of work?

TEAM DISCUSSION STARTERS (FOR MANAGERS OR TEAM MEETINGS)

- “Looking at the scenarios in this module, which banking environment feels most relevant to our team right now, and how can we support each other in those situations?”
- “How can we as a team practise using the 5 Ds in our daily work while respecting our different roles, cultural backgrounds, and communication styles?”
- “What team norm could we adopt this month to make it easier for everyone to speak up or offer support when they notice concerning dynamics?”
- “How does supporting each other in the workplace help strengthen our families and communities at home?”

End your reflection by acknowledging one strength you already bring as a Skilled Upstander Colleague. Your willingness to reflect and apply these tools makes a meaningful difference in building safer, more supportive banking teams. Well done.

SECTION 7: QUICK REFERENCE TOOLS

MODULE 8 POCKET GUIDE – REAL BANKING SCENARIOS

5 D'S DECISION TREE (QUICK FLOW)

1. **Pause & Ground** → Take one calming breath.
2. **Assess Situation & Safety** → Low risk? → Consider **Direct** or **Distract**. High risk / unsure? → **Delegate** or **Document**.
3. **Choose & Act** → Use respectful language.
4. **Follow Through** → **Delay** (check in later) + self-care.

Environment Adaptor

- **Branch:** Quick, discreet actions in front of customers.
- **Call Centre:** Use chat/private messages or post-call check-ins.
- **Back-Office:** Team huddles and private conversations.
- **Hybrid:** Mute/unmute, chat, or private breakout.

KEY PHRASES SUMMARY (COPY & PRACTISE)

- **Distract:** “Let’s focus on the customer/task — how can I support?”
- **Direct:** “I noticed that felt disrespectful. We treat each other with respect here.”



- **Delegate:** “I’m concerned — shall we bring in our team leader / HR?”
- **Delay:** “That sounded tough. How are you doing? I’m here if you want to talk.”
- **Disclosure Support:** “I believe you. Would it help to connect with EAP or TEARS?”

Team Norm Reminder: “We keep our team safe by speaking up respectfully.”

SELF-CARE & GROUNDING QUICK TIPS (UKUKHULA)

1. **5-4-3-2-1 Grounding:** 5 things you see, 4 you can touch, 3 sounds, 2 breaths, 1 value (e.g. respect/family).
2. **CBT Anchor:** “I am contributing to team safety in this environment.”
3. **Post-Support Reset:** Stand, stretch, drink water, name one thing you handled well.
4. **NLP Self-Talk:** “I responded with care. Now I return to my tasks grounded.”

DAILY UPSTANDER CHECKLIST

- ☐ Noticed a dynamic today?
- ☐ Chose a 5 D or supportive response?
- ☐ Used a grounding tool if needed?
- ☐ Checked in with myself or a colleague?

Keep this page handy or save it on your phone. These tools are designed for real banking moments — small actions, big impact on safety and culture. You are making a difference.

SECTION 8: RESOURCES & SIGNPOSTING

INTERNAL BANK RESOURCES

- Employee Assistance Programme (EAP) – confidential counselling and support (available 24/7 via your bank’s dedicated line or app).
- Harassment and GBV Reporting Channels – refer to your bank’s HR policy, Code of Conduct, or internal whistle-blower platform.
- Psychological Safety & Wellbeing Contacts – your team leader, HR business partner, or designated wellbeing champion.
- Internal Learning Portal – revisit any module videos or manuals.

EXTERNAL SUPPORT

- TEARS Foundation: 0800 11 77 66 (24-hour helpline for GBV support).
- National GBV Command Centre: 0800 428 428 (24 hours).
- Lifeline South Africa: 0861 322 322.

- Other local services: Check your province for community-based counselling and legal support.

RELATED PROGRAMME RESOURCES

- Module 4 & 5: Responding to Disclosures – Core Principles and Support.
- Module 6: Practical Tools for Addressing Bullying & Low-Level Harassment.
- Module 11: Protecting Yourself & Your Colleagues – Self-Care, Boundaries & Vicarious Resilience.
- Full 12-module programme and PDF manuals for ongoing reference.

ENCOURAGING CLOSING MESSAGE

You have now completed Module 8 and taken an important step in turning knowledge into confident, context-aware action. Every time you apply these skills in your branch, call centre, back-office, or hybrid environment, you help create safer workplaces and stronger families across South Africa.

You are a valued Skilled Upstander Colleague. Trust your ability to make a difference — one respectful response, one supportive check-in at a time. The team and the community are stronger because you choose to act.

Well done. Keep going — we're in this together.

