

Keys to Civility

Keeping Your Cool When the Numbers Get Hot

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Character + Emotional Intelligence for Finance Professionals

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Quick show of hands...

Have you ever been the “bad guy” because you said...

“It’s not in the budget.”

“We can’t do that.”

“I need
documentation.”

Your job can create friction, even when you’re right.



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Our goal today

CIVILITY

What people experience

CHARACTER

What guides your choices

EQ

How you manage
pressure

Practical tools for the moments when pressure, people and public money collide.



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Civility is not “being nice”

Respect + restraint + professionalism + dignity

Especially during disagreement, pressure or frustration.

The test of civility is what happens when things go sideways.



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Why civility matters in finance

TRUST

Your numbers need credibility and so do you.

INFLUENCE

You need cooperation from people you don't control.

REPUTATION

Your demeanor becomes part of the organization's reputation.

Being right is important. Being heard is, too.



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Where does your civility get tested?

Budget season

Audit findings

Council questions

Spending requests

“Urgent” emails

Call one out.



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Character: what guides the choice

1 Trustworthiness

Honest. Accurate.
Consistent.

2 Respect

Dignity - even in
disagreement.

3 Responsibility

Own it. Follow through.

4 Fairness

Use consistent processes.

5 Caring

Remember the person.

6 Citizenship

Protect the public good.

Finance puts three pillars under a spotlight

✓ **TRUSTWORTHINESS**

- Accurate reporting
- Clear facts
- No convenient omissions



FAIRNESS

- Consistent criteria
- Transparent process
- No favorites

! **RESPONSIBILITY**

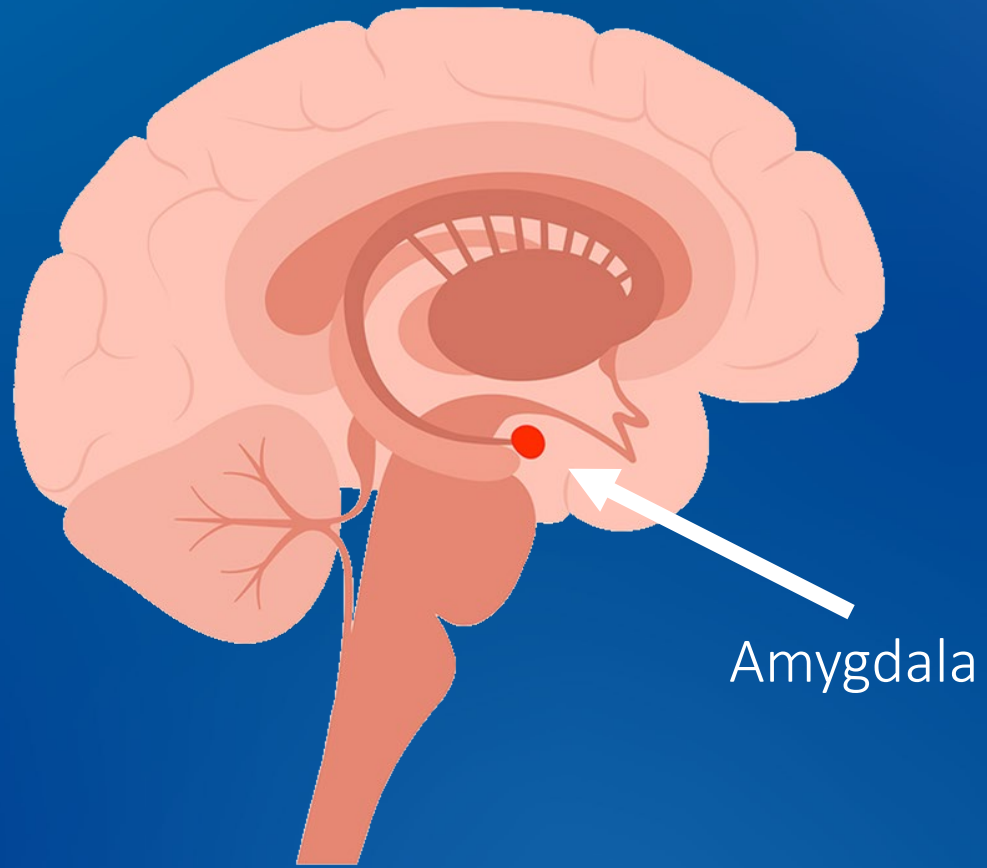
- Own the work
- Meet the deadline
- Raise concerns early

Which one gets tested most in your role?

The brain under pressure



EQ creates space between reaction and response.



- Scans for threat
- Reacts quickly
- Can trigger emotion before reflection

What's your default under stress?

Which one sounds most like you?

FIGHT

Push back

FLIGHT

Avoid it

FREEZE

Go blank

FAWN

Just say yes

None is a character flaw.

All can create problems if they run the meeting.

Emotional intelligence: four domains

1 SELF-AWARENESS

Know what I'm feeling and why.

2 SELF-MANAGEMENT

Choose what I do with it.

3 SOCIAL AWARENESS

Notice what others may be feeling.

4 RELATIONSHIP MANAGEMENT

Use that awareness to handle tension well.

1. Self-awareness

Know your triggers before they know you.

NAME IT

“I’m frustrated.”
“I’m anxious.”
“I feel dismissed.”

MAP IT

Which people, phrases
or situations activate
you?

CHECK IMPACT

How do I come across
when I’m stressed?

2. Self-management

High performance requires recovery.

II PAUSE

Don't answer at the speed of irritation.

✓ PLAN

Prepare for predictable pressure.

| BOUNDARIES

Not every urgent request becomes your emergency.

↻ RECOVER

Sleep, food, movement and time off are performance tools.

The finance trap

“I’ll rest when this is over.”

Budget → audit → year-end → next budget...



There may never be a perfect stopping point. Build recovery into the cycle.

3. Social awareness

Read the room - not just the spreadsheet.

LISTEN

What are they actually concerned about?

NOTICE

Tone, body language and what isn't being said.

EMPATHIZE

Understanding is not the same as agreeing.

4. Relationship management

BE CLEAR

Say what needs to be
said without
unnecessary damage.

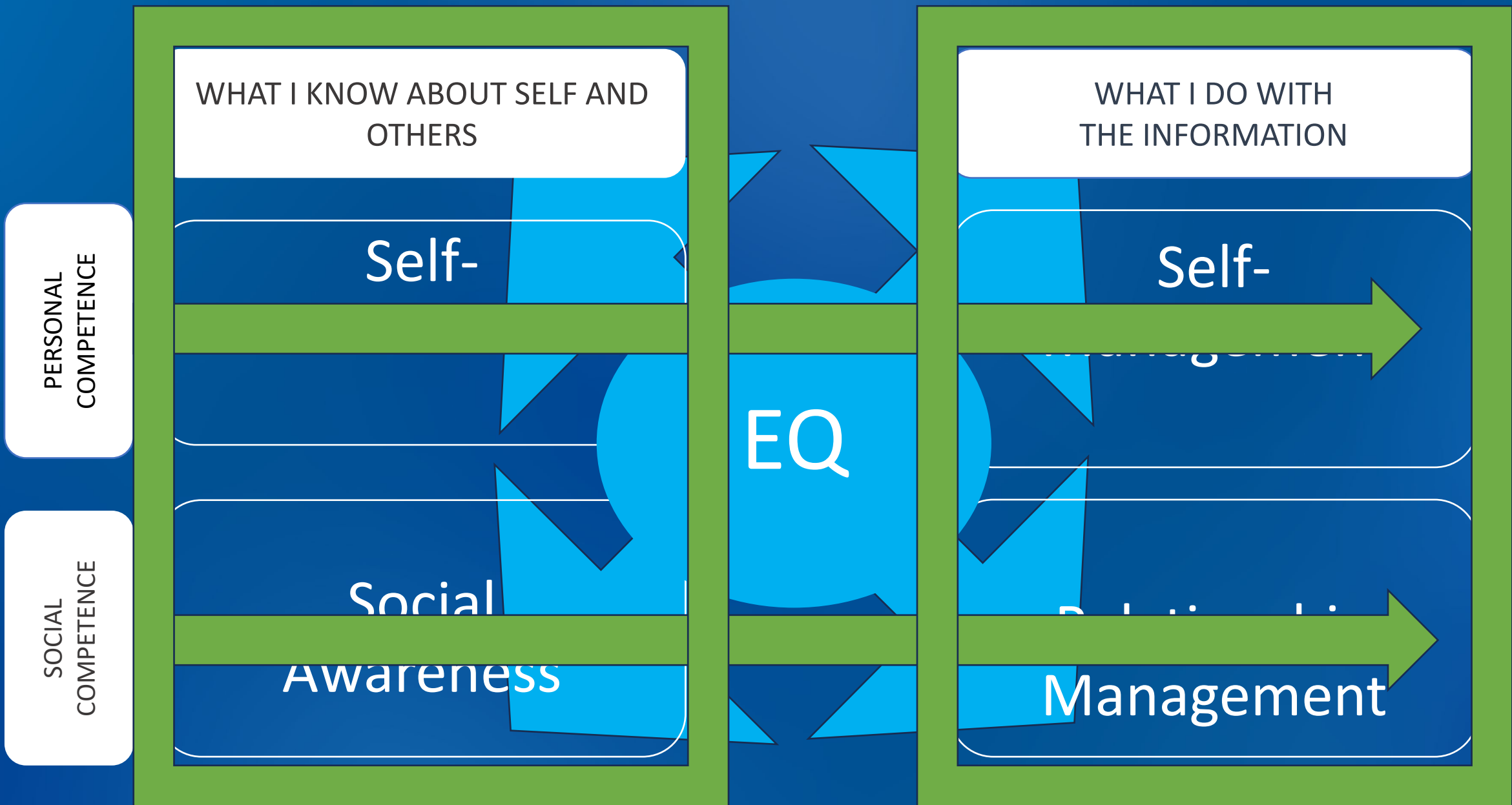
BE CURIOUS

Ask before you assume.

BUILD TRUST

Explain the why.
Follow through.
Be consistent.

You don't have to like someone to work with them well.



Scenario: the hallway confrontation

A department head corners you after a meeting.

Their supplemental budget request was denied. They're angry, raising their voice and saying Finance "never supports operations."

What happens next?

Step 1: notice the reaction

FIGHT

FLIGHT

FREEZE

FAWN

What might be happening for
them?

What might be happening for you?

Call it out.

Step 2: choose the anchors

CHARACTER

- Trustworthiness
- Fairness
- Respect

EQ

- Self-management
- Social awareness
- Relationship management

GOAL

Protect the relationship without changing the facts.

Civil does not mean “give in.”

Step 3: respond

“I can hear that you’re frustrated. I’m willing to walk through the decision and what options are still available. I want to do that productively, so let’s move somewhere we can talk without raising our voices.”

Acknowledge • Boundary • Next step



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What if they keep escalating?

DON'T MATCH IT

Lower your pace and volume. Stay factual.

SET THE LIMIT

“I want to continue this conversation, but not while we’re yelling.”

PAUSE IF NEEDED

End the interaction and set a time to resume.

Boundaries are part of civility.



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A 10-second reset

Before the reply...

NOTICE

What am I feeling?

CHOOSE

What matters here?

RESPOND

What helps next?

Ten seconds can save a ten-email cleanup.



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Put it all together

CHARACTER

+

**EMOTIONAL
INTELLIGENCE**

=

CIVILITY

Who I choose to be

How I show up

What others experience

The numbers matter. The way we deliver them matters, too.



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One thing to take with you

What will you do differently the next time your civility is tested?

Pause first

Ask a question

Set a boundary

Pick one. Practice it on purpose.



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Thank You!

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