BUSINESS COMMUNICATION TODAY

15th Edition



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Business Communication Today

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Dedication

This book is dedicated to the many thousands of instructors and students who use Bovée and Thill texts to develop career-enhancing skills in business communication. We appreciate the opportunity to play a role in your education, and we wish you the very best with your careers.

Courtland L. Bovée

John V. Thill

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Preface

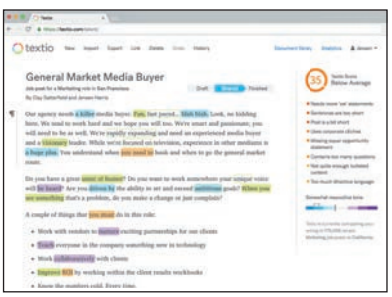
New to This Edition

ADDING VALUE WITH NEW STUDENT-FOCUSED FEATURES

- **Build Your Career** activities help students create their employment-communication packages throughout the course so they're ready to apply for jobs by the end of the course.
- **Apply Your Skills Now** highlight boxes help students apply their newly developing communication skills in other classes and in their personal lives.
- **Five-Minute Guides** serve as handy reminders of the steps needed to accomplish a variety of fundamental communication tasks, from writing business email to planning reports and presentations.

KEEPING STUDENTS ON THE LEADING EDGE WITH *INTELLIGENT COMMUNICATION TECHNOLOGY*

The digital transformation sweeping through business is creating a host of new communication tools and techniques that students will encounter during their job searches and in the workplace. A new four-page visual feature, "Empowering Communicators with Intelligent Communication Technology," shows 15 applications of artificial intelligence and smart technology. New highlight boxes take a close look at innovations ranging from augmented writing tools to résumé bots.



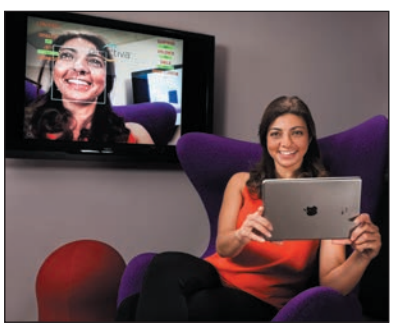
ENSURING FRESH, UP-TO-THE-MINUTE CONTENT

Nearly 90 new figures. The Fifteenth Edition has 93 annotated model documents, 43 examples of mobile communication in business communication, 15 examples of social media, and 14 examples of intelligent communication technology.

Nearly 150 new questions and student activities. Every chapter has fresh project ideas and evaluation questions.

Revamped Communication Cases. Half the cases now feature real companies in a wide variety of industries, giving students multiple opportunities to create real-world messages and documents.

Ten new chapter-opening Communication Close-Ups. These chapter-opening vignettes and end-of-chapter challenges show students how professionals apply the same skills they are reading about in the chapter. The new Close-Ups in this edition include Affectiva, John Deere, Patreon, Stitch Fix, and Wells Fargo.





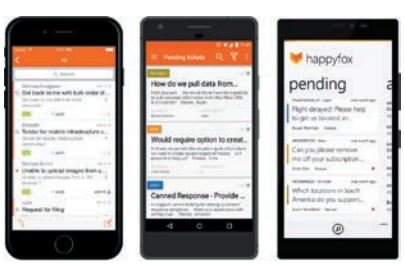
CHAPTER-BY-CHAPTER UPDATES

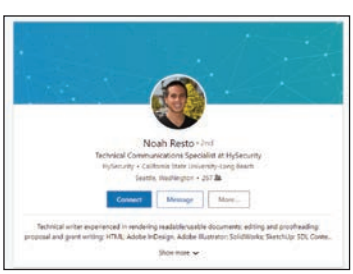
Chapter 1: Professional Communication in a Digital, Social, Mobile World	**New Communication Close-Up** describes how Affectiva uses artificial intelligence to improve the emotional aspects of digital communication. **Understanding Why Communication Matters** The many benefits of effective business communication are now organized in the three categories of *operations, intelligence*, and *relationships*. **Communicating as a Professional** Employer expectations regarding communication abilities have been simplified to four groups of related skills. **Exploring the Communication Process** Coverage of *selection perception* revised to address *selective attention*. **Using Technology to Improve Communication** The introductory coverage of communication technology has been extensively revised to explain its potential benefits and to highlight three important sets of tools: social and workgroup communication systems, mobile communication, and *intelligent communication technology* (the application of artificial intelligence to business communication). **Committing to Ethical and Legal Communication** Expanded coverage of unethical communication now categorizes it as withholding information, distorting information, or plagiarizing. **Developing Skills for Your Career** New section highlights six skills this course helps students develop in addition to communication. **New highlight box:** Apply Your Skills now: Practice Your Professionalism
Chapter 2: Collaboration, Interpersonal Communication, and Business Etiquette	**New Communication Close-Up** featuring Salesforce's Marc Benioff and the importance of good listening skills. **Types of Teams** Revised coverage helps distinguish the most common types of business teams. **Characteristics of Effective Teams** Updated discussion includes the importance of *psychological safety* in team settings. **Stages of Team Development** Now covers the Tuckman model of team development. **Resolving Conflict in Teams** Expanded section includes a step-by-step process for resolving team conflict. **Virtual Teams** New section covers the benefits and challenges of virtual teamwork and offers tips for success in virtual team environments. **Improving Your Listening Skills** Section extensively revised and expanded to give students better insights into why listening is such a complex process, the choices and behaviors that affect listening quality, and how to become a better listener (including the five elements of active listening). **Improving Your Nonverbal Communication Skills** Expanded discussion debunks the myth that nonverbal signals carry most of the message in face-to-face communication. **Collaborating on Communication Efforts** Now includes advice for various collaboration arrangements, from writer-editor to full collaboration, and updates on technologies for collaborative communication. **Business Etiquette in the Workplace** Expanded coverage of workplace behavior and the four levels of business attire. **New highlight box:** Intelligent Communication Technology: Hi, I'm an Algorithm, Your New Teammate



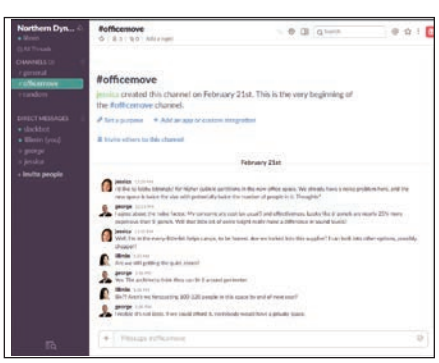


Chapter 3: Communication Challenges in a Diverse, Global Marketplace	**Recognizing Variations in a Diverse World** Updated coverage of generational differences and ability differences. **New highlight box:** Intelligent Communication Technology: Real-Time Translation
Chapter 4: Planning Business Messages	**Choosing Between Direct and Indirect Approaches** Describes the three scenarios where the indirect approach is most likely to be helpful. **Building Reader Interest with Storytelling Techniques** Adds the use of storytelling in planning and decision-making. **New highlight box:** Intelligent Communication Technology: Shaping Stories with the Help of Artificial Intelligence
Chapter 5: Writing Business Messages	**New Communication Close-Up** featuring independent business writer Kaleigh Moore **Using Words Correctly** Expanded discussion of the dilemmas business communicators face regarding the evolution of language, such as the increasing acceptance of *they* as a singular pronoun. **New highlight box:** Intelligent Communication Technology: Amplifying Your Writing with Augmented Writing Software **New highlight box:** Apply Your Skills Now: Think Now, Write Later
Chapter 6: Completing Business Messages	**New highlight box:** Apply Your Skills Now: Make QA Part of Your Communication Process
Chapter 7: Digital Media	**The Emoji Question—Overcoming the Limitations of Lean Media** Comprehensive coverage of the complicated issue of emoji usage in contemporary business communication with practical advice for using or avoiding them. **The Email Subject Line: Persuading People to Open Your Messages** Expanded advice for writing compelling subject lines that encourage recipients to open messages. **Business Messaging** Updated coverage of the six categories of short-messaging services in use in business today and tips for successful messaging. **New highlight box:** Apply Your Skills Now: Develop Professional-Grade Email Skills **New highlight box:** Intelligent Communication Technology: Nice Chatting with You
Chapter 8: Social Media	**New Communication Close-Up** describing how ExterionMedia used an internal social network to improve organizational communication. **How Businesses Use Social Media for Internal and External Communication** Updated coverage of how businesses use social networking for both internal and external communication. **Establishing a Social Media Strategy** New section discusses the six sets of questions companies need to ask to craft an effective social media strategy. **Developing Social Media Content** Extensively revised and expanded coverage walks students through the process of planning, writing, and publishing social media content; includes advice on everything from identifying the types of social content that appeals to readers to improving the readability of social media content. **Managing the Organizational Challenges of Social Media** New section looks at the managerial challenges of using social media in business.





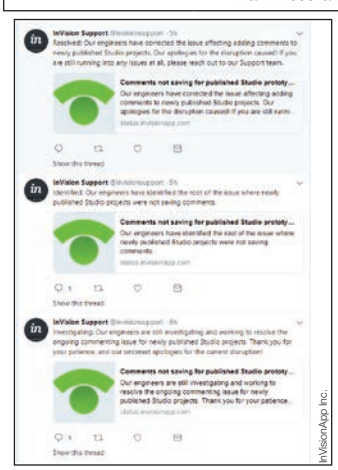
Chapter 8: Social Media	**Four Content Strategies for Business Social Networking** New section outlines the four key ways communicators can ensure a steady flow of quality content. **Successful Business Blogging** Updated coverage of blogging includes tips on choosing the types of posts that tend to interest readers the most. **Business Applications of Microblogging** Includes new advice on writing compelling and effective business tweets. **Collaborative Writing on Wikis** New advice on the managerial issues of using wikis for internal and external communication. **New highlight box:** Intelligent Communication Technology: Monitoring the Social Media Sphere with Smart Listening Tools
Chapter 9: Visual Media	**New Communication Close-Up** discusses how Tableau Software is making data visualization tools easily accessible to business professionals who must work with increasingly complex sets of data. **Selecting Visuals for Presenting Data** New coverage of radar diagrams **New highlight box:** Intelligent Communication Technology: Augmented Reality and Virtual Reality
Chapter 10: Writing Routine and Positive Messages	**Writing Instructions** New section with tips for writing effective user guides and other instructional material. **Asking for Recommendations** Expanded information on this challenging communication task.
Chapter 11: Writing Negative Messages	**New Communication Close-Up** on Wells Fargo's efforts to recover from its massive accounts scandals. **Using the Direct Approach for Negative Messages** Coverage of apologies expanded with a four-step decision process. **Refusing Requests for Recommendations and References** Updated with clear guidance on how to sensitively refuse these requests. **Giving Negative Performance Reviews** Updated with latest advice from industry experts. **Terminating Employment** Updated with latest advice from industry experts. **New highlight box:** Apply Your Skills Now: Prepare Yourself for a Difficult Conversation
Chapter 12: Writing Persuasive Messages	**New Communication Close-Up** on Katrina Lake's use of persuasive communication to help launch the revolutionary clothing company Stitch Fix. **Balancing the Three Types of Persuasive Appeals** Expanded with an introduction to the three classical appeals of ethos, pathos, and logos. **New highlight box:** Apply Your Skills Now: Making Difficult Requests
Chapter 13: Finding, Evaluating, and Processing Information	**Quoting, Paraphrasing, and Summarizing** Offers expanded step-by-step advice for paraphrasing source materials. **New highlight box:** Intelligent Communication Technology: Finding Meaning with Text Mining
Chapter 14: Planning Reports and Proposals	**New Communication Close-Up** that highlights how John Deere uses its annual reports to communicate effectively with its diverse stakeholders.





Courtesy of Panasonic

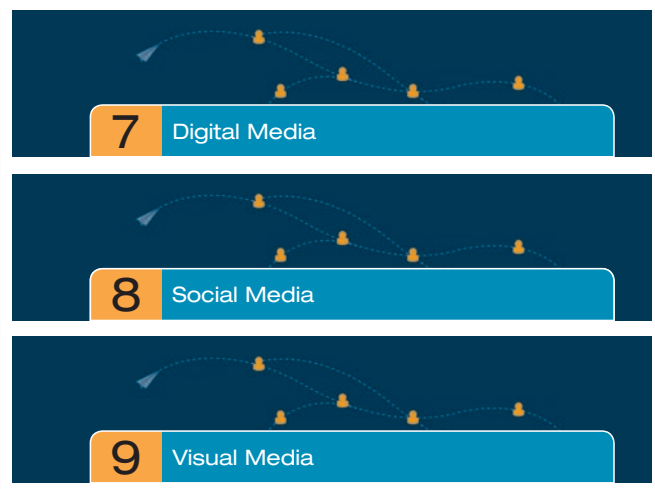
Chapter 15: Writing and Completing Reports and Proposals	**New Communication Close-Up** on McKinsey & Company's innovative *Five Fifty* report format, which combines mobile-friendly five-minute overviews with in-depth analytical reports.
Chapter 16: Developing Presentations in a Social Media Environment	**Ensuring Successful Team Presentations** New section on planning, rehearsing, and delivering team presentations.
Chapter 17: Enhancing Presentations with Slides and Other Visuals	**Using Presentation Software to Create Visual Reports** New section with advice on creating visual reports using presentation software.
Chapter 18: Building Careers and Writing Résumés	**Finding the Ideal Opportunity in Today's Job Market** Updated with advice on dealing with AI during the job search and cleaning up one's digital footprint. **Building Your Network** Updated with more advice on becoming a valued career networker. **Addressing Areas of Concern** Updated advice on handling frequent job changes and a criminal record when writing one's résumé. **References** New section on the three types of references every job seeker needs to prepare. **Building an Effective LinkedIn Profile** Major new section on preparing a compelling LinkedIn presence. **New highlight box:** Intelligent Communication Technology: Make Friends with the Résumé Bots
Chapter 19: Applying and Interviewing for Employment	**New Communication Close-Up** featuring Erica Joy Baker's efforts to encourage companies to adopt more-inclusive and better-informed hiring practices. **Understanding the Interviewing Process** Streamlined to two stages, *screening* and *selection*. **Common Types of Interviews and Interview Questions** Reorganized to clarify various types of interviews and interview questions. **Behavioral Interview Questions** Updated with new examples and coverage of the STAR tactic for answering questions. **Case Interviews and Take-Home Assessments** New coverage of these assessment methods. **Interviewing by Phone** Extensive advice on successful phone interviews. **Interviewing by Video** Extensive advice on successful video interviews. **New highlight box:** Intelligent Communication Technology: Getting Comfortable with AI-Assisted Recruiting and Interviewing **New highlight box:** Intelligent Communication Technology: Improving Fairness and Finding Better Talent with Blind Auditions





Solving Learning and Teaching Challenges

Communication is the most valuable skill that graduates can bring into the workforce, but it is one of the most challenging to teach. *Business Communication Today* blends the timeless fundamentals of communication with contemporary media skills. To help students succeed from their first day on the job, *Business Communication Today* presents the full range of workplace communication skills that today's professionals need, from writing conventional reports to using the latest digital, social, mobile, and visual media.



Helping Students Adapt Their Media Habits to the Demands of the Work Environment

Today's students have plenty of experience with digital, social, and visual media, but not all that experience translates well to the business world. *Business Communication Today* shows students how to apply what they already know about media usage—and which habits they need to develop or change to succeed as professionals.

Providing Detailed Opportunities to Learn by Example

Annotated model documents show students the specific ways that communication efforts can succeed or fail, making it easy to apply these lessons to their own messages. *Business Communication Today* is packed with a mix of carefully chosen examples from professional communicators and original material created to illustrate specific concepts.

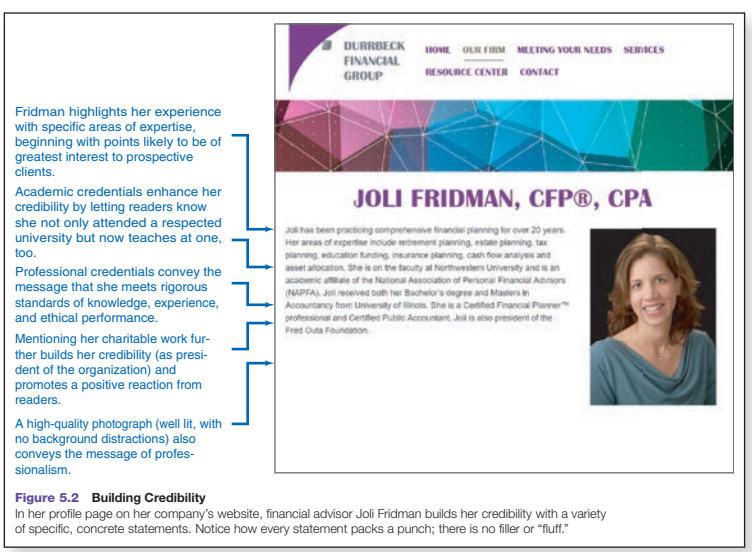


Figure 5.2 **Building Credibility**
In her profile page on her company's website, financial advisor Joli Fridman builds her credibility with a variety of specific, concrete statements. Notice how every statement packs a punch; there is no filler or "fluff."

Giving Students Real-Life Skills and Real-Life Perspectives

All the skills guidance in the text is presented in the context of real-life applications, often featuring companies that students already know. Students can see how today's professionals use the same skills they will learn in the course.

LEARNING OBJECTIVES

After studying this chapter, you will be able to

1. Apply the three-step writing process to persuasive messages.
2. Describe an effective strategy for developing persuasive business messages, and identify the three most common categories of persuasive business messages.
3. Describe an effective strategy for developing marketing and sales messages, and explain how to modify your approach when writing promotional messages for social media.
4. Identify steps you can take to avoid ethical lapses in marketing and sales messages.



Bloomberg/Getty Images

Stitch Fix cofounder and CEO Katrina Lake relied heavily on persuasive communication skills to secure funding and attract top talent to her start-up company.

COMMUNICATION CLOSE-UP AT
Stitch Fix

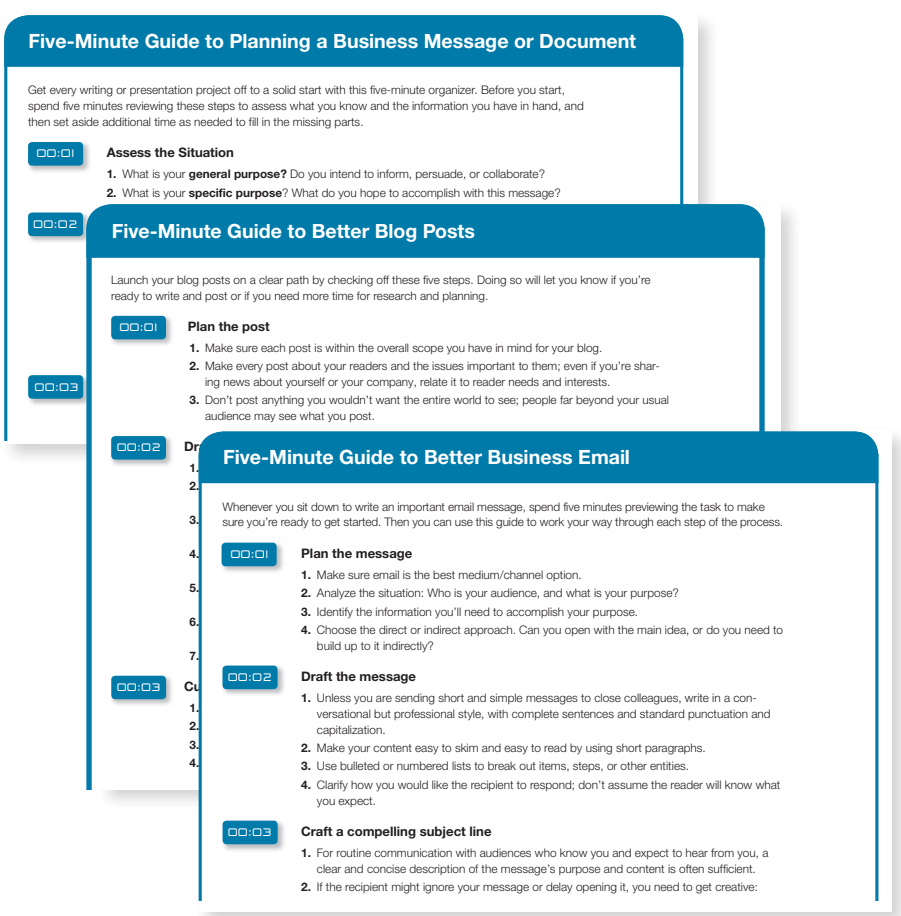
www.stitchfix.com

Katrina Lake's path to entrepreneurship didn't start with the stereotypical urge to create a company. In fact, she kept waiting for someone else to create the company she had in mind so she could buy from it and invest in it. During the first two phases of her career, in a retail consulting firm and then a venture capital firm, she kept looking for someone to solve what she believed was the central problem of online fashion retailing: "How can we marry the ease of shopping online with what people want in clothes, which is really about fit and style?"

After waiting for someone else to pitch the right idea to her in the hopes of getting investment capital, she decided to launch it herself. She went back to school to pursue an MBA at Harvard, where her idea began to take real shape and Stitch Fix was born. The concept was a clothing retailer that would combine the convenience of online shopping with the individual touch of the stylists and personal shoppers available in higher-end shops and department stores. Customers could receive a small selection of items chosen by a personal stylist (with the help of some powerful artificial intelligence) and then buy what they like and send back what they don't.

Lake believed in the idea from the outset, but the need to persuade others to believe in it began early and has been an evolving challenge ever since. At Harvard, for instance, her professors pointed out the mammoth inventory-management challenge that the send-and-return model would create. Later, when she was pitching the company to investors from the other side of the table, she had to convince mostly older, mostly male venture capitalists that this was a viable business model because it addressed an unmet need among a mostly younger, female audience.

However, enough people began to believe. Sales took off as more and more women responded to the idea of getting personalized style advice and the convenience of new wardrobe pieces shipped to their front door. Just as important, some major-league talent from across the retailing sector began to believe in her vision, too. High-ranking executives from Netflix, Nike, Walmart, and Salesforce.com signed on, each bringing specific areas of expertise needed to scale up Lake's vision, from inventory management to merchandising to AI and data analytics. The AI component is crucial because it extends the reach of the stylists by continually identifying new clothing choices that customers are most likely to enjoy.

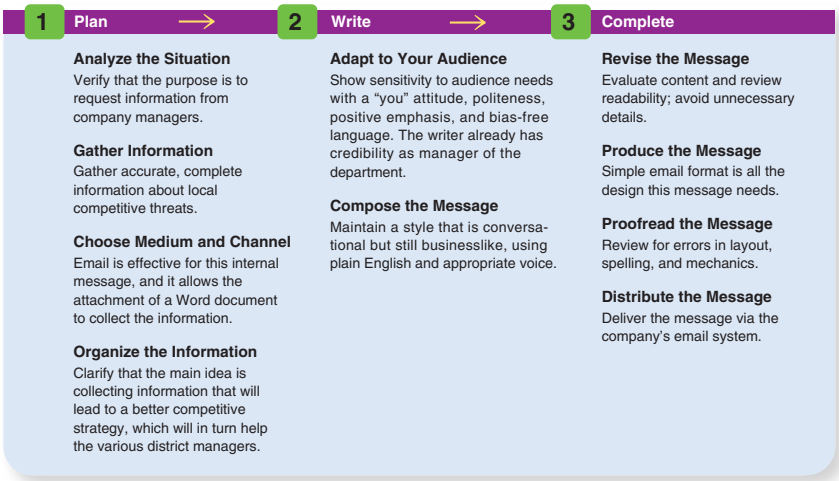


Helping Students Apply Their Skills in Other Courses and on the Job

Remembering the essential steps of a task months or years after learning them is always a challenge. With multiple quick-reference tables and new Five-Minute Guides, the text serves as a valuable resource that students can use in other courses and take with them on the job.

Reducing Stress and Uncertainty for Students

Students sometimes flounder when faced with unfamiliar or difficult writing challenges because they don't know how to move a project forward. By following the proven three-step process described in *Business Communication Today*, they never have to feel lost or waste time figuring out what to do next.



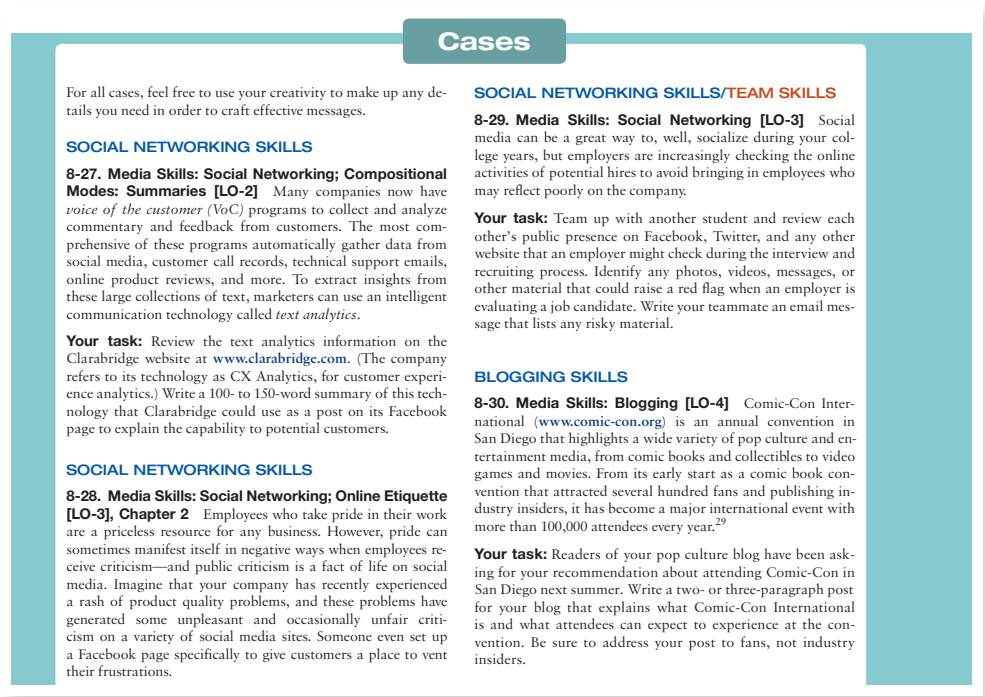
Providing Unique Insights with Original Coverage

Bovée and Thill make unique contributions to the pedagogy and practice of business communication, such as the nine compositional modes required to succeed with digital and social media.

COMPOSITIONAL MODES FOR DIGITAL AND SOCIAL MEDIA

As you practice using various media and channels in this course, it's best to focus on the fundamentals of planning, writing, and completing messages, rather than on the specific details of any one medium or system.[2] Fortunately, the basic communication skills required usually transfer from one system to another. You can succeed with written communication in virtually all digital media by using one or more of nine *compositional modes*:

- **Conversations.** Although they take place via writing, some forms of digital communication function more like real-time conversations than the sharing of written documents. "Business Messaging," starting on page 200, explores this important and growing communication format.
- **Comments and critiques.** One of the most powerful aspects of social media is the opportunity for interested parties to express opinions and provide feedback, whether it's leaving comments on a blog post or reviewing products on an e-commerce site. Sharing helpful tips and insightful commentary is also a great way to build your personal brand. To be an effective commenter, focus on short chunks of information that a broad spectrum of other site visitors will find helpful. And even if you are offering criticism, keep it constructive. Angry rants and insults won't help anyone, and they brand you as unprofessional.
- **Orientations.** The ability to help people find their way through an unfamiliar system or subject is a valuable writing skill and a talent that readers greatly appreciate. Unlike summaries (see the next item), orientations don't give away the key points in the collection of information but rather tell readers where to find those points. Writing effective orientations can be a delicate balancing act because you need to know the material well enough to guide others through it while being able to step back and view it from the inexperienced perspective of a "newbie."
- **Summaries.** At the beginning of an article or webpage, a summary functions as a miniature version of the document, giving readers all the key points while skipping over details (see Figure 7.1). At the end of an article or webpage, a summary functions as a review, reminding readers of the key points they've just read.



Cases

For all cases, feel free to use your creativity to make up any details you need in order to craft effective messages.

SOCIAL NETWORKING SKILLS

8-27. Media Skills: Social Networking; Compositional Modes: Summaries [LO-2] Many companies now have *voice of the customer (VoC)* programs to collect and analyze commentary and feedback from customers. The most comprehensive of these programs automatically gather data from social media, customer call records, technical support emails, online product reviews, and more. To extract insights from these large collections of text, marketers can use an intelligent communication technology called *text analytics*.

Your task: Review the text analytics information on the Clarabridge website at www.clarabridge.com. (The company refers to its technology as CX Analytics, for customer experience analytics.) Write a 100- to 150-word summary of this technology that Clarabridge could use as a post on its Facebook page to explain the capability to potential customers.

SOCIAL NETWORKING SKILLS

8-28. Media Skills: Social Networking; Online Etiquette [LO-3], Chapter 2 Employees who take pride in their work are a priceless resource for any business. However, pride can sometimes manifest itself in negative ways when employees receive criticism—and public criticism is a fact of life on social media. Imagine that your company has recently experienced a rash of product quality problems, and these problems have generated some unpleasant and occasionally unfair criticism on a variety of social media sites. Someone even set up a Facebook page specifically to give customers a place to vent their frustrations.

SOCIAL NETWORKING SKILLS/TEAM SKILLS

8-29. Media Skills: Social Networking [LO-3] Social media can be a great way to, well, socialize during your college years, but employers are increasingly checking the online activities of potential hires to avoid bringing in employees who may reflect poorly on the company.

Your task: Team up with another student and review each other's public presence on Facebook, Twitter, and any other website that an employer might check during the interview and recruiting process. Identify any photos, videos, messages, or other material that could raise a red flag when an employer is evaluating a job candidate. Write your teammate an email message that lists any risky material.

BLOGGING SKILLS

8-30. Media Skills: Blogging [LO-4] Comic-Con International (www.comic-con.org) is an annual convention in San Diego that highlights a wide variety of pop culture and entertainment media, from comic books and collectibles to video games and movies. From its early start as a comic book convention that attracted several hundred fans and publishing industry insiders, it has become a major international event with more than 100,000 attendees every year.[29]

Your task: Readers of your pop culture blog have been asking for your recommendation about attending Comic-Con in San Diego next summer. Write a two- or three-paragraph post for your blog that explains what Comic-Con International is and what attendees can expect to experience at the convention. Be sure to address your post to fans, not industry insiders.

Offering a Wide Range of Assessment and Skill-Development Opportunities

Hundreds of realistic exercises, activities, and cases give students multiple opportunities to practice vital skills and put newfound knowledge to immediate use.

These resources are logically sorted by learning category, from conceptual recall to situational analysis to skill development.

To help instructors zero in on specific learning needs, activities are tagged in multiple ways, including media usage and team skills.



Supporting Instructors with Free Resources

No other textbook comes close to offering the free instructional resources the authors provide—many of which are available exclusively to Bovée and Thill adopters:

- Sponsored instructor communities on LinkedIn and Facebook with nearly two thousand members
- Tips and techniques in *Bovée and Thill's Business Communication Blog* and Twitter feed
- The Bovée & Thill channel on YouTube
- Videos and PowerPoint presentations on SlideShare
- Hundreds of infographics, videos, articles, podcasts, and PowerPoints on the Business Communication Pictorial Gallery on Pinterest
- The Ultimate Guide to Resources for Teaching Business Communication
- Eleven curated magazines for business communication on Scoop.it

Links to all these services and resources can be found at **blog.businesscommunicationnetwork.com/resources**.

DEVELOPING EMPLOYABILITY SKILLS

In addition to helping students develop a full range of communication skills, *Business Communication Today* boosts a wide range of other skills that experts say are vital for success in the 21st-century workplace:

- **Critical thinking.** In many assignments and activities, students need to define and solve problems and make decisions or form judgments.
- **Collaboration.** Team-skills assignments provide multiple opportunities to work with classmates on reports, presentations, and other projects.
- **Knowledge application and analysis.** From the basic communication process to strategies for specific message types, students will learn a variety of concepts and apply that knowledge to a wide range of challenges.
- **Business ethics and social responsibility.** Ethical choices are stressed from the beginning of the book, and multiple projects encourage students to be mindful of the ethical implications that they could encounter in similar projects on the job.
- **Information technology skills.** Projects and activities in every chapter help students build skills with technology, including document preparation tools, online communication services, presentation software, and messaging systems.
- **Data literacy.** Report projects in particular present opportunities to fine-tune data literacy skills, including the ability to access, assess, interpret, manipulate, summarize, and communicate data.

For more information and resources, please visit www.pearson.com

Acknowledgments

The Fifteenth Edition of *Business Communication Today* reflects the professional experience of a large team of contributors and advisors. We express our thanks to the many individuals whose valuable suggestions and constructive comments influenced the success of this book.

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About the Authors



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John Thill

Courtland L. Bovée and John V. Thill have been leading textbook authors for more than two decades, introducing millions of students to the fields of business and business communication. Their award-winning texts are distinguished by proven pedagogical features, extensive selections of contemporary case studies, hundreds of real-life examples, engaging writing, thorough research, and the unique integration of print and digital resources. Each new edition reflects the authors' commitment to continuous refinement and improvement, particularly in terms of modeling the latest practices in business and the use of technology.

Professor Bovée has 22 years of teaching experience at Grossmont College in San Diego, where he has received teaching honors and was accorded that institution's C. Allen Paul Distinguished Chair. Mr. Thill is a prominent communications consultant who has worked with organizations ranging from Fortune 500 multinationals to entrepreneurial start-ups. He formerly held positions with Pacific Bell and Texaco.

Courtland Bovée and John Thill were recently awarded proclamations from the Governor of Massachusetts for their lifelong contributions to education and for their commitment to the summer youth baseball program that is sponsored by the Boston Red Sox.

Prologue

BUILDING A SUCCESSFUL CAREER WITH YOUR COMMUNICATION SKILLS

One Course—Three Powerful Benefits

You will invest considerable time and energy in this course, so it's fair to ask what you will get in return. The simple answer: *a lot*. If you practice the techniques you'll discover here and use this opportunity to develop with your instructor's guidance, we're confident this course will help you in three important ways:

1. It will help you succeed in college.
2. It will help you conduct a more successful job search.
3. It will help you succeed in your first job so you can build a thriving career.

The following sections expand on this promise and offer valuable career-planning advice. Table 1 on the next page highlights the specific features of this book that can help you at every stage.

HOW THIS COURSE WILL HELP YOU

Take advantage of this opportunity to develop the single most important skill you'll need for a rewarding career: the ability to communicate. This textbook is desiged to help you in three valuable ways.



1. SUCCEED IN COLLEGE

Many of the skills you will learn in this course—writing, giving presentations, working in teams, resolving conflict, and more—can be applied in just about every course you take from now until graduation.



2. FIND THE RIGHT JOB

The entire job search process is really an extended exercise in communication, and the process gives you the chance to use your communication skills to stand apart from the competition.



3. LAUNCH YOUR CAREER

The bulk of this course is devoted to the communication and media skills you will need to use as soon as you enter (or reenter) the workforce. Succeed in your first job, and you'll be on your way to a rewarding career!

TABLE 1 Textbook Features to Help You at Every Stage of College and Career

	Textbook Feature	Stage 1: Succeeding in College		Stage 2: Conducting a Successful Job Search	Stage 3: Succeeding in Your First Job
		In This Course	In Other Courses		
Beginning of chapter	**Learning Objectives**	Use these to focus your study and review			
	Communication Close-Up	See how the pros use chapter concepts		Get a sense of life on the job in various professions	
Within the chapter	**Margin notes**	Scan to get a quick review of the chapter			
	Figures	Study model documents to see what works and what doesn't	Study reports and other model documents to improve your writing	Use model letters and résumés to build your job search package	Use model documents to craft better documents on the job
	Tables	Get quick summaries of important topics, such as writing effective email messages	Get quick summaries of important topics	Get quick summaries of important topics	Get quick summaries of important topics
	Mobile App highlights	Many of these apps can help with school work	Many of these apps can help with school work	Use selected apps to help in your job search	Use the apps on the job
	Checklists	Confirm understanding of each section	Use for a quick review if needed when writing	Use for a quick review if needed when writing	Use for a quick review if needed when writing
	Highlight boxes	*Apply Your Skills Now* helps you apply communication skills in and out of class	*Apply Your Skills Now* helps you apply communication skills in and out of class	*Developing as a Professional* gets you ready for the world of work	*Intelligent Communication Technology* and *Practicing Ethical Communication* prepare you for the job
End of chapter	**Communication Challenges**	Solve realistic challenges from the company profiled in the chapter-opening Close-Up			
	Key Terms glossary	Quickly refer to important terms			
	Summary of Learning Objectives	Test your recall of chapter content			
	Test Your Knowledge	Confirm your recall of essential ideas from the chapter			
	Apply Your Knowledge	Analyze communication scenarios to hone your insights			
	Practice Your Skills	Practice chapter skills in a variety of challenges			
	Expand Your Skills	Critique professional communication efforts and find career advice			
	Build Your Career	Use the exercise in each chapter to build your employment package		By the time you get to the employment chapters, you'll have a head start on your résumé package	Use these techniques to adjust your employment package as you progress
	Cases (selected chapters)	Practice crafting professional-quality messages and documents		Use the *Portfolio Builder* cases to expand your employment portfolio	
	Five-Minute Guides (selected chapters)	Get quick reminders of how to accomplish important tasks	Use these for communication tasks in other classes, too	Use the guide in Chapter 18 to prepare and update your résumé	
Online	**MyLab Business Communication**	Use this optional online system for customized learning and more			

Stage 1: Succeeding in College

The first step in your career starts right now, with getting your degree and getting the most from all the courses you take between now and graduation. The communication skills you learn in this class can help you in virtually every other course. From brief homework assignments to complicated team projects to interactions with your professors, you will be able to communicate more effectively.

In addition to improving your communication effectiveness, this course will also improve your efficiency. Follow the writing process outlined in this book, and you can avoid the time-wasting uncertainty, dead ends, and rework that can make writing projects drag on forever.

Keep an eye out for the special highlight boxes titled "Apply Your Skills Now," which offer tips on using your new skills in all your college courses. Read these boxes and think about the situations in which you can apply the advice. If you need to have a difficult conversation with an instructor or resolve conflict in a project team, for example, these boxes can help. Many of these techniques can help you outside of the school environment, too, whenever you face communication challenges in any of your interpersonal relationships.

QUICK TIPS TO SUCCEED IN THIS COURSE

Although this course explores a wide range of message types and appears to cover quite a lot of territory, the underlying structure of the course is rather simple. You'll learn a few basic concepts, identify the key skills to use and procedures to follow—and then practice, practice, practice. Whether you're writing a blog post in response to one of the real-company cases or drafting your own résumé, you'll be practicing the same fundamental skills in a variety of scenarios. With feedback and reinforcement from your instructor and your classmates, your confidence will grow and the work will become easier and more enjoyable.

Some of the assignments will involve business topics that may be new to you or somewhat less than exciting, but view them all as opportunities to hone your craft. Visualize yourself in each scenario and imagine that you are trying to convince a skeptical boss, calm an angry customer, or accomplish whatever task is assigned.

As you read each chapter, take time to study the examples and model documents (see Figure 1 on the next page). This book offers dozens of realistic examples of business messages, many with notes along the sides that explain strong and weak points. Some are messages from real companies; others were created to show specific points about writing. Study these documents and any other examples your instructor provides. Learn what works and what doesn't, and then apply these lessons to your own writing.

Along the way, learn from the feedback you get from your instructor and from other students. Don't take the criticism personally; your instructor and your classmates are commenting about the work, not about you. Always view feedback as an opportunity to improve.

QUICK TIPS FOR WRITING ASSIGNMENTS IN ANY COURSE

For assignments in this or any other course, particularly major projects such as reports and presentations, follow these suggestions to produce better results with less effort:

- **Don't panic!** If the thought of writing a report or giving a speech sends a chill up your spine, you're not alone. Everybody feels that way when first learning business communication skills, and even experienced professionals can feel nervous about big projects. Keep three points in mind. First, every project can be broken down into a series of small, manageable tasks. Don't let a big project overwhelm you; it's nothing more than a bunch of smaller tasks. Second, remind yourself that you have the skills you need. As you move through the course, the assignments are carefully designed to match the skills you've developed up to that point. Third, if you feel panic creeping up on you, take a break and regain your perspective.
- **Focus on one task at a time.** Don't try to organize and express your ideas while simultaneously worrying about audience reactions, grammar, spelling, formatting, page design, and a dozen other factors. Fight the temptation to do everything at

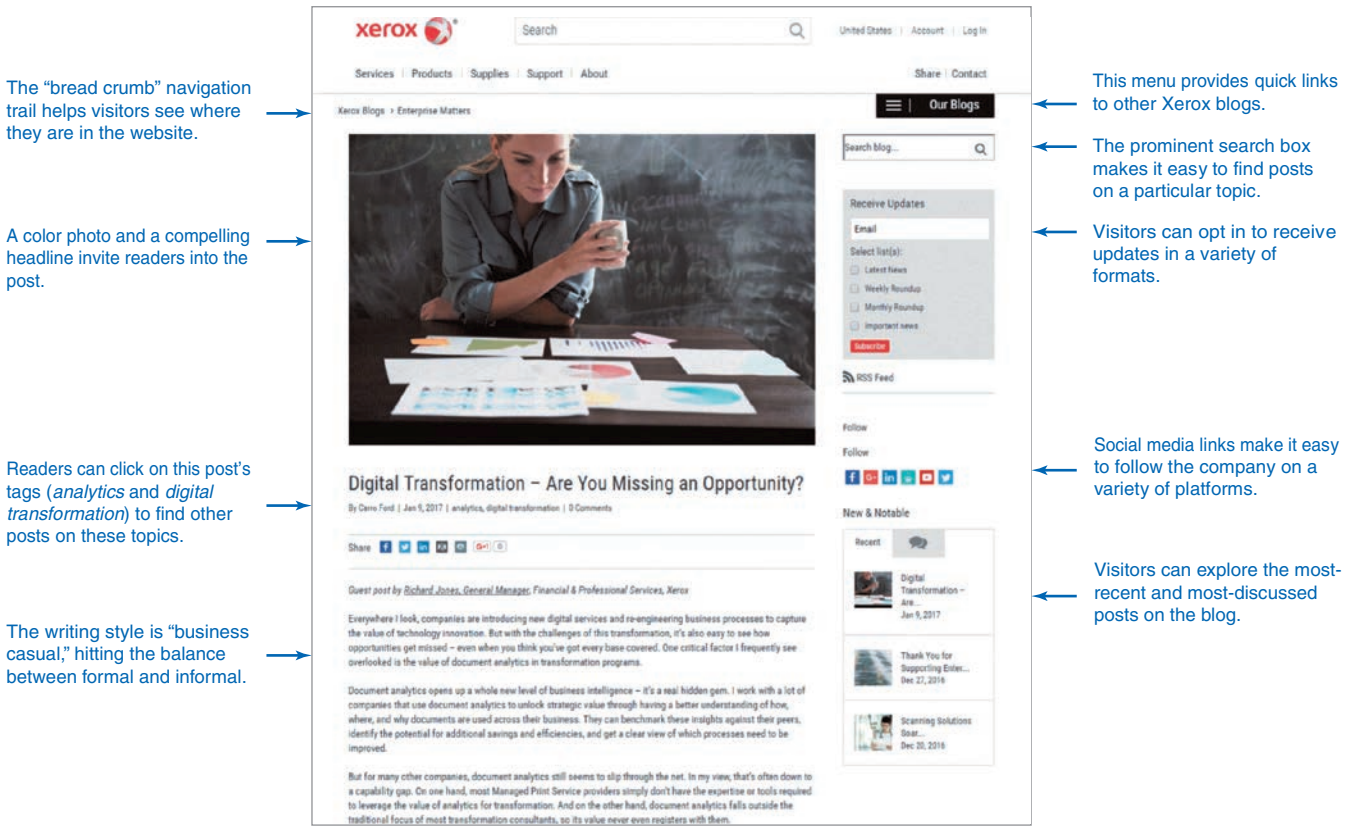


Figure 1 Learning from Model Documents and Messages
You will find a wide variety of model documents and messages throughout the book, everything from tweets to formal reports. Study the notes in the margins to understand why specific writing techniques work (or don't work, in some cases), and apply these lessons to your own writing.

once. Trying to get everything perfect on the first pass will make the process slow and frustrating. In particular, don't worry too much about word choices or overall writing style during your first draft. Concentrate on the organization of your ideas first, then the best way to express those ideas, and then finally the presentation and production of your messages. Following the three-step writing process is an ideal way to focus on one task at a time in a logical sequence.

- **Give yourself plenty of time.** As with every other school project, waiting until the last minute creates unnecessary stress. Writing and speaking projects are much easier if you tackle them in small stages with breaks in between rather than trying to get everything done in one frantic blast. Moreover, there will be instances when you simply get stuck on a project, and the best thing to do is walk away and give your mind a break. If you allow room for breaks in your schedule, you'll minimize the frustration and spend less time overall on your homework, too.
- **Step back and assess each project before you start.** The writing and speaking projects you'll have in this course cover a wide range of communication scenarios, and it's essential that you adapt your approach to each new challenge. Resist the urge to dive in and start writing without a plan. Ponder the assignment for a while, consider the various approaches you might take, and think carefully about your objectives before you start writing. Nothing is more frustrating than getting stuck halfway through because you're not sure what you're trying to say or you've wandered off track. Spend a little more time planning, and you'll spend a lot less time writing.
- **Use the three-step writing process.** Those essential planning tasks are the first step in the three-step writing process, which you'll learn about in Chapter 4 and use throughout the course. This process has been developed and refined by professional writers with decades of experience and thousands of projects ranging from short blog posts to 600-page textbooks. It works, so take advantage of it.



The techniques you will learn in this course will help you become a more successful writer, and they will make the process of writing easier and faster, too.

Stage 2: Conducting a Successful Job Search

Every activity in the job-search process relies on communication. The better you can communicate, the more successful you'll be at landing interesting and rewarding work. Plus, you can reduce the stress of preparing a résumé and going to job interviews.

Writing a résumé can be a big task, but you don't need to do it all at once if you give yourself plenty of time. The 19 Build Your Career activities (see the end of each chapter) show you how to build your job-search package one step at time. Do the activity in each chapter, and by the time you finish the book, you'll have the materials you need to start your job search.

Chapters 18 and 19 are dedicated to employment-related communication, including writing your résumé and preparing for interviews. If your course doesn't cover these chapters, your college probably offers a workshop or other activity to help you get ready to apply and interview for jobs. No matter where you learn these skills, this section will help you think about the career you want to craft for yourself, with advice on finding the best fit, developing an employment portfolio, and defining your personal brand.

FINDING THE BEST FIT

Figuring out where and how you can thrive professionally is a lifelong quest. You don't need to have all the answers today, and your answers will no doubt change in the coming years. However, start thinking about it now so that you can bring some focus to your job search. Organize your strategic planning with three questions: what you want to do, what you have to offer, and how you can make yourself more valuable.

What Do You Want to Do?

Economic necessities and the dynamics of the marketplace will influence much of what happens in your career, and you may not always have the opportunity to do the kind of work you would really like to do. Even if you can't get the job you want right now, though, start your job search by examining your values and interests. Doing so will give you a better idea of where you want to be eventually, and you can use those insights to learn and grow your way toward that ideal situation. Consider these factors:

- **What would you like to do every day?** Research occupations that interest you. Find out what people really do every day. Ask friends, relatives, alumni from your school, and contacts in your social networks. Read interviews with people in various professions to get a sense of what their careers are like.



The day-to-day activities of different professions can vary widely. Do as much research as you can before you choose a career path to make sure it's the right path for you.

- **How would you like to work?** Consider how much independence you want on the job, how much variety you like, and whether you prefer to work with products, systems, people, ideas, words, figures, or some combination thereof.
- **How do your financial goals fit with your other priorities?** For instance, many high-paying jobs involve a lot of stress, sacrifices of time with family and friends, and frequent travel or relocation. If other factors—such as stability, location, lifestyle, or intriguing work—are more important to you, you may have to sacrifice some level of pay to achieve them.
- **Have you established some general career goals?** For example, do you want to pursue a career specialty such as finance or manufacturing, or do you want to gain experience in multiple areas with an eye toward general management or entrepreneurship?
- **What sort of work culture are you most comfortable with?** Would you be happy in a formal hierarchy with clear reporting relationships? Or do you prefer less structure? Teamwork or individualism? Do you prefer a competitive environment or a more cooperative culture?

You might need some time in the workforce to figure out what you really want to do, but it's never too early to start thinking about where you want to be. Filling out the assessment in Table 2 might help you get a clearer picture of the nature of work you would like to pursue in your career.

What Do You Have to Offer?

Knowing what you want to do is one thing. Knowing what companies or clients are willing to pay you to do is another thing entirely. You may already have a good idea of what you can offer employers. If not, some brainstorming can help you identify your skills, interests, and characteristics. Start by listing achievements you're proud of and experiences that were satisfying, and identify the skills that enabled these achievements. For example, leadership skills, speaking ability, and artistic talent may have helped you coordinate a successful class project. As you analyze your achievements, you may begin to recognize a pattern of skills. Which of these would be valuable to potential employers?

Next, look at your educational preparation, work experience, and extracurricular activities. What do your knowledge and experience qualify you to do? What have you learned from volunteer work or class projects that could benefit you on the job? Have you held any offices, won any awards or scholarships, mastered a second language? What skills have you developed in nonbusiness situations that could transfer to a business position?

Take stock of your personal characteristics. Are you assertive, a born leader? Or are you more comfortable contributing under someone else's leadership? Are you outgoing, articulate, and comfortable around people? Or do you prefer working alone? Make a list of what you believe are your four or five most important qualities. Ask a relative or friend to rate your traits as well.

TABLE 2 Career Planning Self-Assessment

Activity or Situation	Strongly Agree	Agree	Disagree	No Preference
1. I want to work independently.				
2. I want variety in my work.				
3. I want to work with people.				
4. I want to work with technology.				
5. I don't want to be stuck in an office all day.				
6. I want mentally challenging work.				
7. I want to work for a large organization.				
8. I want to work for a nonprofit organization.				
9. I want to work for a small business.				
10. I want to work for a service business.				
11. I want to start or buy a business someday.				
12. I want regular, predictable work hours.				
13. I want to work in a city location.				
14. I want to work in a small town or suburb.				
15. I want to work in another country.				
16. I want to work from home, even if I'm employed by someone else.				
17. I want to work in a highly dynamic profession or industry, even if it's unstable at times.				
18. I want to have as much career stability as possible.				
19. I want to enjoy my work, even if that means making less money.				
20. I want to become a high-level corporate manager.				

If you're having difficulty figuring out your interests, characteristics, or capabilities, consult your college career center. Many campuses administer a variety of tests that can help you identify interests, aptitudes, and personality traits. These tests won't reveal your "perfect" job, but they'll help you focus on the types of work best suited to your personality.

How Can You Make Yourself More Valuable?

While you're figuring out what you want from a job and what you can offer an employer, you can take positive steps toward building your career. First, look for opportunities to develop skills, gain experience, and expand your professional network. These might involve internships, volunteer work, freelance projects, part-time jobs, or projects that you initiate on your own. You can look for freelance projects on Craigslist and numerous other websites; some of these jobs have only nominal pay, but they do provide an opportunity for you to display your skills. Also consider applying your talents to *crowdsourcing* projects, in which companies and nonprofit organizations invite the public to contribute solutions to various challenges. Look for ways to expand your *employment portfolio* and establish your *personal brand* (see the following sections).

Second, learn more about the industry or industries in which you want to work, and stay on top of new developments. Join networks of professional colleagues and friends who can help you keep up with trends and events. Follow the leading voices in a profession on social media. Many professional societies have student chapters or offer students discounted memberships. Take courses and pursue other educational or life experiences that would be difficult while working full time.



Whether you call it your personal brand or your professional promise, figure out what you want to be as a professional and how you should communicate that to employers, colleagues, and clients.

BUILDING AN EMPLOYMENT PORTFOLIO

Employers want proof that you have the skills to succeed on the job, which can be challenging if you don't have a lot of relevant work experience in your target field. Fortunately, you can use your college classes, volunteer work, and other activities to assemble compelling proof by creating an *employment portfolio*, a collection of projects that demonstrate your skills and knowledge.

Your portfolio is likely to be a multimedia effort, with physical work samples (such as reports, proposals, or marketing materials), digital documents, web content, blog posts, photographs, video clips, and other items. As appropriate, you can include these items in your LinkedIn profile, bring them to interviews, and have them ready whenever an employer, client, or networking contact asks for samples of your work.

You have a variety of options for hosting a portfolio online. Your LinkedIn profile (see page 540) can function as your portfolio home, your college may offer portfolio hosting, or you might consider one of the many commercial portfolio hosting services.

Throughout this course, pay close attention to the assignments marked "Portfolio Builder," which start in Chapter 7. These items can make good samples of your communication skills and your ability to understand and solve business-related challenges. By combining these projects with samples from your other courses, you can create a compelling portfolio when you're ready to start interviewing. Your portfolio is also a great resource for writing your résumé because it reminds you of all the great work you've done over the years. Moreover, you can continue to refine and expand your portfolio throughout your career; many independent professionals use portfolios to advertise their services.

As you assemble your portfolio, collect anything that shows your ability to perform, whether it's in school, on the job, or in other venues. However, you *must* check with employers before including any items that you created while you were an employee, and check with clients before including any *work products* (anything you wrote, designed, programmed, and so on) they purchased from you. Many business documents contain confidential information that companies don't want distributed to outside audiences.

For each item you add to your portfolio, write a brief description that helps other people understand the meaning and significance of the project. Include such items as these:

- **Background.** Why did you undertake this project? Was it a school project, a work assignment, or something you did on your own initiative?
- **Project objectives.** Explain the project's goals, if relevant.
- **Collaborators.** If you worked with others, be sure to mention that and discuss team dynamics if appropriate. For instance, if you led the team or worked with others long distance as a virtual team, point that out.
- **Constraints.** Sometimes the most impressive thing about a project is the time or budget constraints under which it was created. If such constraints apply to a project, consider mentioning them in a way that doesn't sound like an excuse for poor quality. If you had only one week to create a website, for example, you might say that "One of the intriguing challenges of this project was the deadline; I had only one week to design, compose, test, and publish this material."
- **Outcomes.** If the project's goals were measurable, what was the result? For example, if you wrote a letter soliciting donations for a charitable cause, how much money did you raise?
- **Learning experience.** If appropriate, describe what you learned during the course of the project.

Keep in mind that the portfolio itself is a communication project, so be sure to apply everything you'll learn in this course about effective communication and good design. Also, assume that potential employers will find your e-portfolio site, even if you don't tell them about it, so don't include anything that doesn't represent you at your professional best.

BUILDING YOUR PERSONAL BRAND

You have probably heard the advice to develop a "personal brand" but might not know how to proceed or might not be comfortable with the concept of "branding" yourself. This section presents five steps that can make the task easier and more authentic.

Note that the process outlined here isn't about coming up with three or four words that are supposed to describe you, such as *visionary, creator, problem solver,* or things like that, as you may come across in some discussions of personal branding. This is a much more practical and comprehensive process that identifies the specific qualifications that you can bring to the job, backs them up with solid evidence, and makes sure you are ready with a concise answer when an employer asks, "So, tell me about yourself."

Don't Call It Personal Branding If You Don't Care for the Term

Some people object to the term personal branding, with its associations of product marketing, the implied need to "get out there and promote yourself," and perhaps the unseemly idea of reducing something as complex as yourself to an advertising slogan. If you are just starting you career, you might also wonder how to craft a meaningful brand when you don't have any relevant work experience.

Moreover, although personal branding makes obvious sense for professional speakers, authors, consultants, entrepreneurs, and others who must promote themselves in the public marketplace, those who aspire to professional or managerial positions in a corporate structure may rightly wonder why they need to "brand" themselves at all.

However, the underlying concept of branding as a *promise* applies to everyone, no matter the career stage or trajectory. A brand is fundamentally a promise to deliver on a specific set of values. For everyone in business, that promise is critical, whether it extends to a million people in the online audience for a TED talk or a half-dozen people inside a small company. And even if you never think about your personal brand, you are continuously creating and re-creating it by the way you conduct yourself as a professional. In other words, even if you reject the idea of personal branding, other people will form an opinion of you and your "brand" anyway, so you might as well take charge and help create the impression that you want others to have of you.

As an alternative to a personal brand, think of your *professional promise*. Frame it this way: When people hear your name, what do you want them to think about you and your professional attributes and qualifications?

Write the "Story of You"

When it's time to write or update your résumé, step back and think about where you've been in your life and your career and where you'd like to go. Helpful questions include *Do you like the path you're on, or is it time for a change? Are you focused on a particular field, or do you need some time to explore?*

This is also a great planning tool for developing a personal brand. In Chapter 18, you'll see this referred to as writing the "story of you," and it's divided into three sections:

- **Where I have been**—the experiences from my past that give me insight into where I would like to go in the future
- **Where I am now**—where I currently stand in terms of education and career, and what I know about myself (including knowledge and skills, personal attributes, and professional interests)
- **Where I want to be**—the career progress and experiences I want to have, areas I want to explore, and goals I want to achieve

Think in terms of an image or a theme you'd like to project. *Am I academically gifted? A daring innovator? A well-rounded professional with wide-ranging talents? A technical wizard? A dependable, "go-to" problem solver that people can count on? A "connector" who can bring people and resources together?*

Writing this story arc is a valuable planning exercise that helps you think about where you want to go in your career. In essence, you are clarifying who you are professionally and defining a future version of yourself—and these are the foundations of your personal brand/professional promise. Another important benefit is that it makes the personal branding effort authentic, because it is based on your individual interests and passions.

Construct Your Brand Pyramid

With your professional story arc as a guide, the next step is to construct a *brand pyramid* that has all the relevant support points needed to build a personal brand message (see Figure 2).

Start by compiling a *private inventory* of skills, attributes, experience, and areas for improvement. This should be a positive but realistic assessment of what you have to offer now and a "to-grow" list of areas where you want to develop or improve. Obviously, this inventory isn't for public consumption. As much as possible, provide evidence to back up each quality you list. If you are diligent and detail oriented, for instance, identify a time that you saved a project by methodically analyzing the situation to find a problem that others had overlooked. If you are a creative thinker, identify a time when you came up with an unusual new idea at work. Employers want to know *how* you can apply your skills, attributes, and experience; the more evidence you can provide, the better.

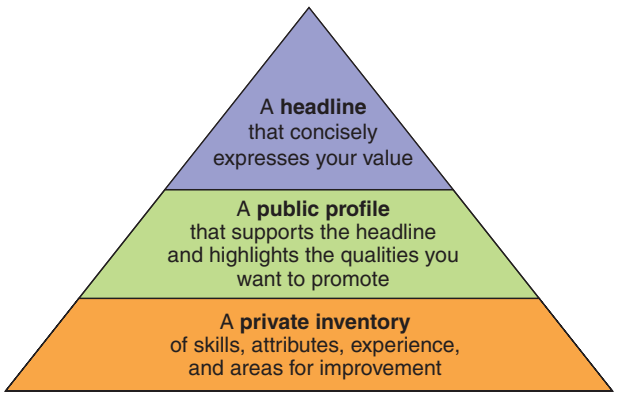


Figure 2 Your Personal Brand Pyramid
Build your personal brand at three levels: a *private inventory* of your skills and assets, a *public profile* based on that inventory and how you want to present yourself to the world, and a *headline* that encapsulates what you can do for employers or clients.

Next, select the appropriate materials from your inventory to develop a *public profile* that highlights the qualities you want to promote. As "Put Your Promise to Work" explains, this profile can take on a variety of forms for different communication platforms.

Finally, distill your professional promise down to a single, brief headline, also known as a *tagline* or *elevator pitch*. The headline should be a statement of compelling value, not a generic job title. Instead of "I'm a social media specialist," you might say "I help small companies get the same reach on social media as giant corporations."

Of course, many students won't have the relevant job experience to say something like that, and your personal brand might be more an expression of potential. Even if you have no relevant professional experience, you still have personal attributes and educational qualifications that are the foundations of your brand. The key is to make sure it's realistic and suggests a logical connection between the present and the future. Someone pursuing an MBA in finance can reasonably claim to have a strong toolset for financial analysis, but someone with no corporate work experience can't claim to be a bold, high-impact executive.

Here's a good example: "I am a data science major ready to make numbers come alive through leading-edge techniques in deep learning, data mining, and visualization."

Note that both your public profile and your headline should use relevant *keywords* from target job descriptions (see page 529).

Reduce or Eliminate Factors That Could Damage Your Brand

Every brand, no matter how popular and powerful, can be damaged by negative perceptions or performance issues. After identifying all the positives, do an objective analysis of areas that could undermine your career building efforts. For example, someone who tends to overpromise and underdeliver is going to develop a reputation for unreliability that could outweigh whatever positive qualities he or she can bring to the job. Other concerns might be related to specific skills that you need to develop in order to progress toward your career goals.

Be constantly mindful of the "multimedia you" that the world sees—your online presence, your personal appearance, your conduct in business and social settings, the way you sound on the phone, your mannerisms, your vocabulary, and anything else that shapes your reputation. Careers can be derailed by a single misjudged social media post, so always be putting the best "you" on display.

Put Your Promise to Work

Now it's time to put the branding message to work. Your public profile could be expressed in a variety of ways—as a conventional résumé, the summary section on LinkedIn, an infographic résumé, or the introductory section of a personal webpage or e-portfolio.

The headline can be adapted and used in multiple ways as well, including the headline field on LinkedIn, the qualifications summary on your résumé, your Twitter profile, and as a ready answer to the common interview question "So, tell me about yourself."

Naturally, your brand message should be consistent across all the platforms and conversations where it used. For instance, an employer reviewing your résumé is likely to visit your LinkedIn profile as well, so it's important that the messages match. If you complete your branding pyramid first, it'll be easy to adapt it to a variety of different purposes while keeping your message consistent.

As you progress through your career, bear in mind that all this planning and communication is of no value if you fail to deliver on your brand promise. Remember that branding is only a *promise*—it's your *performance* that ultimately counts. When you deliver quality results time after time, your talents and professionalism will speak for you.

Lastly, your branding pyramid should be a "living document" that is updated whenever you acquire new skills or job experiences or want to move in a different direction. In addition, periodically revisiting it can be a good way to recapture the passion that initially launched you down your career path.

Stage 3: Succeeding in Your First Job

Your first job sets the stage for your career and gives you an opportunity to explore how you want to position yourself for the long term. If you are already working or are changing careers, you can combine these skills with the work-life perspective you already have to take your career to a new level.

As you progress along your career path, the time and energy you have invested in this course will continue to yield benefits year after year. As you tackle each new challenge, influential company leaders—the people who decide how quickly you'll get promoted and how much you'll earn—will be paying close attention to how well you communicate. They will observe your interactions with colleagues, customers, and business partners. They'll take note of how well you can collect data, find the essential ideas buried under mountains of information, and convey those points to other people. They'll observe your ability to adapt to different audiences and circumstances. They'll be watching when you encounter tough situations that require careful attention to ethics and etiquette. The good news: Every insight you gain and every skill you develop in this course will help you shine in your career.

PART 1

Understanding the Foundations of Business Communication

CHAPTER 1 Professional Communication in a Digital, Social, Mobile World

CHAPTER 2 Collaboration, Interpersonal Communication, and Business Etiquette

CHAPTER 3 Communication Challenges in a Diverse, Global Marketplace

No other skill can help your career in as many ways as communication. Discover what business communication is all about, why communication skills are essential to your career, how intelligent technology is revolutionizing business communication, and how to adapt your communication experiences in life and college to the business world. Improve your skills in such vital areas as listening, nonverbal communication, collaboration, and professional etiquette. Explore the advantages and the challenges of a diverse workforce, and develop the skills that every communicator needs to succeed in today's global, multicultural business environment.



Eric Audras/ONOKY/Getty Images

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1 Professional Communication in a Digital, Social, Mobile World

LEARNING OBJECTIVES

After studying this chapter, you will be able to

1. Explain the importance of effective communication to your career and to the companies where you will work.
2. Explain what it means to communicate as a professional in a business context.
3. Contrast the conventional communication process model with the social communication model.
4. Identify five major benefits of business communication technology and three major innovations that are reshaping the practice of communication.
5. Define *ethics*, explain the difference between an ethical dilemma and an ethical lapse, and list five guidelines for making ethical communication choices.
6. Identify six related skills that you will have the opportunity to develop as you work on your communication skills in this course.



Courtesy of Affectiva

Rana el Kaliouby leads Affectiva's efforts to make computer systems better at understanding and reacting to human emotions.

COMMUNICATION CLOSE-UP AT Affectiva

www.affectiva.com

Like many college students, Rana el Kaliouby pursued her education with an important life goal in mind. In her case, it was developing computer programs that could "read" people's faces, a goal she pursued from her undergraduate studies in Egypt to a PhD program at the University of Cambridge in England to her work as a research scientist in the Media Lab at the Massachusetts Institute of Technology (MIT). She had become fascinated by the possibility of using artificial intelligence (AI) to identify emotional states by measuring facial expressions. Her motivation was to help people on the autism spectrum who struggle to pick up emotional cues when communicating with others. Could a system read faces and provide information to help people have richer social interactions?

After she created a program at MIT that could track emotional responses by comparing facial movements with a catalog of common expressions, she was surprised by how many of the lab's corporate sponsors were interested in it. The inquiries ranged from Toyota, which wanted to know if the program might help detect when drivers were getting drowsy, to Fox Television Studios, which wanted to study how audiences reacted to new shows. With so many potential opportunities to pursue, the Media Lab's management decided the best move was to spin the project out as its own company. That company is Boston-based Affectiva, where el Kaliouby serves as CEO and guides the company's research and development in *affective computing* (computing dealing with human emotions).

The new company's first commercial success was in advertising, with companies using the system to see how viewers respond to digital online content. Businesses spend billions of dollars on advertising every year, for example, and the managers spending that money are understandably curious to know whether their ads are triggering the emotional responses they are designed to trigger.

From there, el Kaliouby and her team began applying the technology to other projects, and now more than a thousand companies use it in such diverse areas as education, health care, gaming, and human resources. (Don't be surprised if you encounter an online video interview during your job search that uses Affectiva's system or something similar to measure your emotional reactions.)

One of the company's latest ventures involves the automotive market, where the technology can monitor the emotional and cognitive states of drivers and passengers. Potential applications include using a car's infotainment system to

communicate with drivers who might be experiencing elevated levels of stress and adjusting the driving style of self-driving taxis if passengers appear to be uncomfortable.

That original dream of helping people with autism hasn't been forgotten, either. A company called Brain Power incorporates Affectiva's capabilities into Google Glass eyeglasses, creating a system that provides children and adults on the spectrum with real-time feedback that helps them develop skills needed to navigate social situations.

Beyond these applications, el Kaliouby wants people to understand how important it is for AI systems to have some degree of empathy, both to be more effective and to make sure that AI becomes a positive force in people's lives rather than a negative one. AI is reaching deeper into just about every aspect of business, including the multiple applications involving communication that you'll read about in this book. The better that computers can get along with us, the better we'll be able to get along with them.[1]

Understanding Why Communication Matters

1 LEARNING OBJECTIVE
Explain the importance of effective communication to your career and to the companies where you will work.

Communication is the process of transferring information, meaning, and understanding between senders and receivers.

Affectiva's work in emotion recognition and analytics (see the chapter-opening Communication Close-Up) highlights the complexity of communication and its importance to every business. **Communication** is the process of transferring information and meaning between senders and receivers, using one or more forms of media. For communication to be considered successful, it also must transfer or negotiate understanding.[2] As Figure 1.1 indicates, communication can happen in a variety of ways, including successful transfers of information and understanding, negotiations in which the sender and receiver arrive at an agreed-on meaning, and unsuccessful attempts in which the receiver assembles a different message than the one the sender intended.

COMMUNICATION IS IMPORTANT TO YOUR CAREER

If you haven't read the Prologue yet, we encourage you to give it a quick read now. It will help you get the most out of your textbook, and it offers tips on using this course to plan a more successful and less stressful job search.

In every career path you can take—employee, independent freelancer, entrepreneur, manager—you will need strong communication skills.

You can have the greatest ideas in the world, but they usually aren't much good to your company or your career if you can't express them clearly and persuasively. Some jobs, such as sales and customer support roles, are primarily about communicating. In fields such as engineering or finance, you often need to share complex ideas with executives, customers, and colleagues, and your ability to connect with people outside your field can be as important as your technical expertise. If you have the entrepreneurial urge, you will need to communicate with a wide range of audiences—from investors, bankers, and government regulators to employees, customers, and business partners.

The changing nature of employment is putting new pressure on communication skills, too. Companies such as Uber and Lyft are the most visible in the *gig economy*, where independent contractors work without many of the advantages or disadvantages of regular employment. Many other companies now supplement their permanent workforces with independent contractors who are brought on for a short period or even just a single project. Chances are you could spend part of your career as one of these independent freelancers, working without the support network that an established company environment provides. If you take this path, you will need to "sell yourself" into each new contract, communicate successfully in a wide range of work situations, and take full responsibility for your career growth and success.

If you move into an executive role or launch your own company, you can expect communication to consume the majority of your time. Top executives spend most of their workdays communicating, and businesspeople who can't communicate well don't stand much chance of reaching the top.

No matter which route you follow, keep in mind that the world is full of good marketing strategists, good accountants, good engineers, and good attorneys—but it is not full of good communicators. View this as an opportunity to stand out from your competition in the job market.

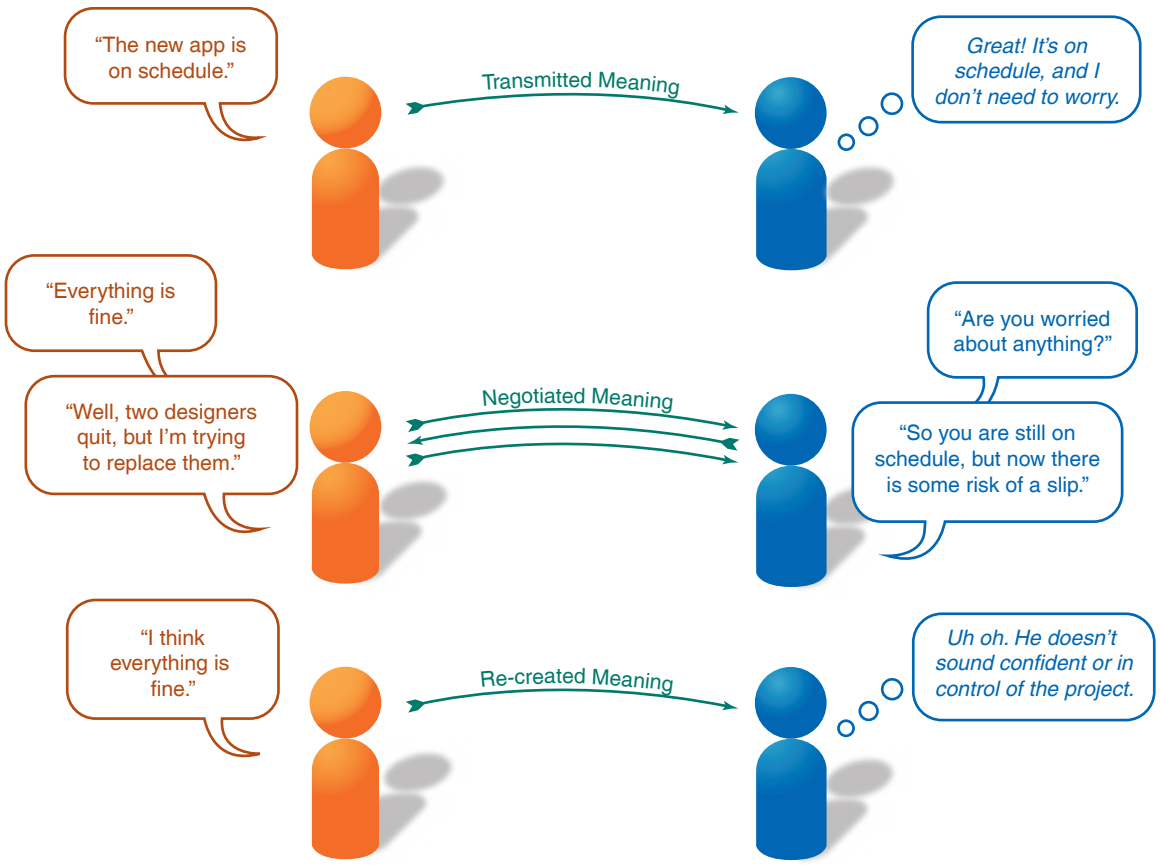


Figure 1.1 Sharing Information and Understanding
These three exchanges between a software project manager (*left*) and his boss (*right*) illustrate the variety of ways in which information is shared between senders and receivers. In the top exchange, the sender's meaning is transmitted intact to the receiver, who accepts what the sender says at face value. In the middle exchange, the sender and receiver negotiate the meaning by discussing the situation. The negotiated meaning is that everything is fine so far, but the risk of a schedule slip is now higher than it was before. In the bottom exchange, the receiver has a negative emotional reaction to the word *think* and as a result creates her own meaning—which is that everything probably is not fine despite what the sender says.

COMMUNICATION IS IMPORTANT TO YOUR COMPANY

Aside from the personal benefits, communication should be important to you because it is important to your company in three essential areas:

Companies rely on communication for efficient operations, timely business intelligence, and positive relationships.

- **Operations.** Every company needs fast, effective communication between managers and staff, within departments, between departments, and between the company and its external business partners. Communication carries everything from high-level strategic plans down to minute technical details, and any bottlenecks or breakdowns can reduce operational efficiency and create problems with quality or safety.
- **Intelligence.** Companies need to keep a constant "ear to the ground" to be alerted to new opportunities, risks, and impending problems—both internally and externally.
- **Relationships.** Just as in personal and social relationships, business relationships depend on communication. Effective communication strengthens the connections between a company and all its **stakeholders**, which are any persons or organizations significantly affected by the company's business decisions and operations.[3] Stakeholder groups include employees, customers, investors, creditors, suppliers, and local communities. Individuals within companies also rely on communication to foster the emotional connections that create a healthy work environment.[4]

Stakeholders are any persons or organizations significantly affected by a company's business decisions and operations.

Put simply, no business can function without effective communication, and the better the communication, the better every part of the company is likely to run.

WHAT MAKES BUSINESS COMMUNICATION EFFECTIVE?

Effective messages are *practical*, *factual*, *concise*, *clear*, and *persuasive*.

To make your communication efforts as effective as possible, focus on making them *practical*, *factual*, *concise*, *clear*, and *persuasive*:

- **Provide practical information.** Give recipients useful information that helps them solve problems, pursue opportunities, or take other action.
- **Give facts rather than vague impressions.** Use concrete language, specific detail, and information that is clear, accurate, and ethical. When an opinion is called for, present compelling evidence to support your conclusion.
- **Communicate efficiently.** Concise messages show respect for people's time, and they increase the chances of a positive response.
- **Clarify expectations and responsibilities.** Craft messages to generate a specific response from readers. When appropriate, clearly state what you expect from audience members or what you can do for them.
- **Offer compelling arguments and recommendations.** When a situation calls for persuasive communication, show your readers how they will benefit if they respond the way you would like them to respond.

Keep these five important characteristics in mind as you compare the ineffective and effective versions of the message in Figure 1.2.

Communicating as a Professional

2 LEARNING OBJECTIVE
Explain what it means to communicate as a professional in a business context.

You've been communicating your entire life, of course, but if you don't have a lot of work experience yet, meeting the expectations of a professional environment might require some adjustment. A good place to start is to consider what it means to be a professional. **Professionalism** is the quality of performing at a high level and conducting oneself with purpose and pride. It means doing more than putting in the hours and collecting a paycheck: True professionals go beyond minimum expectations and commit to making meaningful contributions. Professionalism can be broken down into six distinct traits: striving to excel, being dependable and accountable, being a team player, demonstrating a sense of etiquette, maintaining a positive outlook, and making ethical decisions (see Figure 1.3 on page 8).

Professionalism is the quality of performing at a high level and conducting oneself with purpose and pride.

A key message to take from Figure 1.3 is how much these elements of professionalism depend on effective communication. For example, to be a team player, you must be able to collaborate, resolve conflicts, and interact with a wide variety of personalities. Without strong communication skills, you won't be able to perform to your potential, and others won't recognize you as the professional you'd like to be.

This section offers a brief look at the skills employers will expect you to have, the nature of communication in an organizational environment, and the importance of adopting an audience-centered approach.

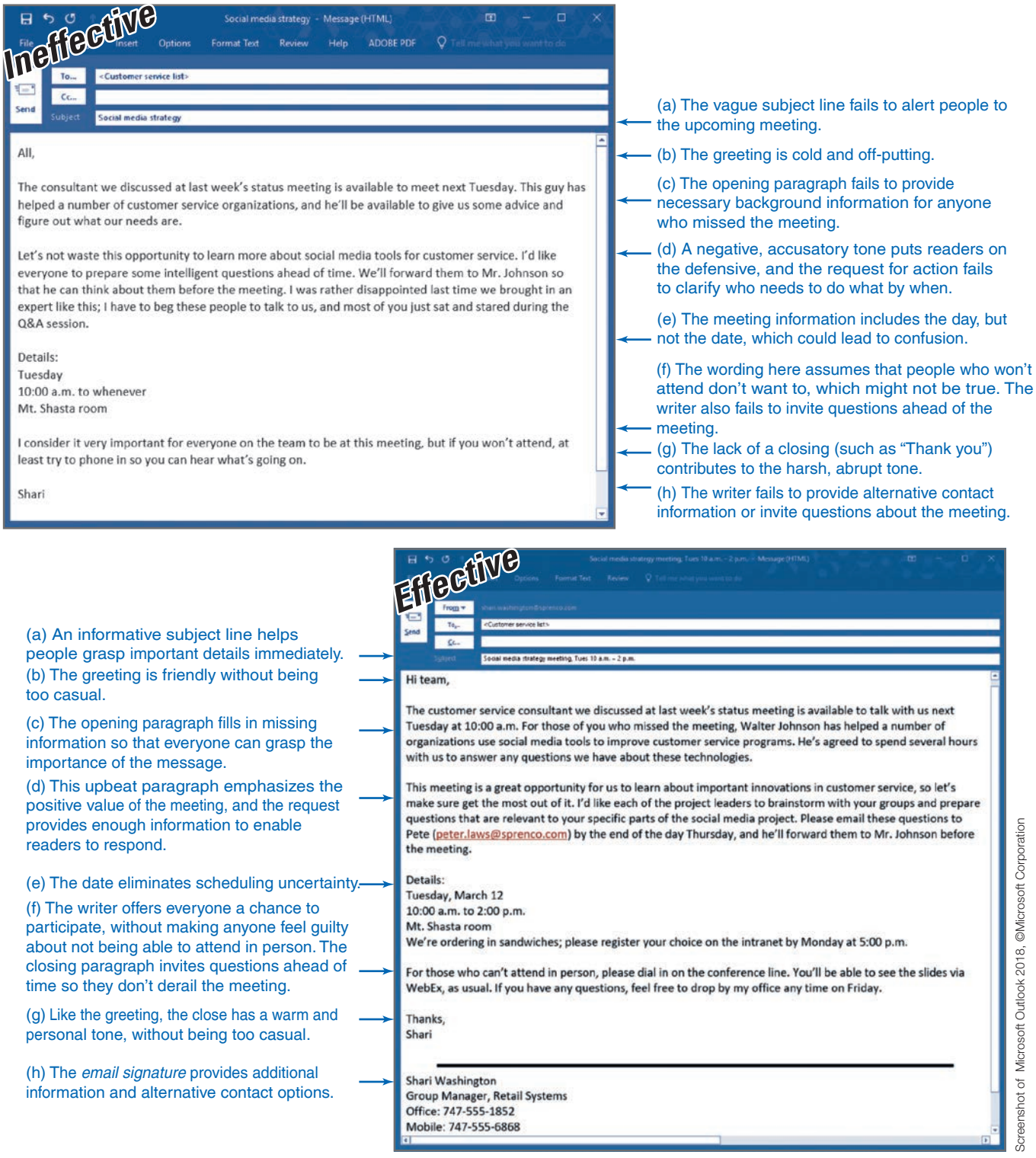
UNDERSTANDING WHAT EMPLOYERS EXPECT FROM YOU

Employers expect you to possess a wide range of communication skills.

Today's employers expect you to be competent at a range of communication tasks that reflect the value of communication discussed on page 5:

- **Acquiring, processing, and sharing information.** Employers expect you to be able to recognize information needs, locate and evaluate reliable sources of information, organize information into cohesive messages, and use information ethically. This collection of skills is often referred to as *digital information fluency*.[5] Information fluency includes **critical thinking**, which is the ability to evaluate evidence completely and objectively in order to form logical conclusions and make sound recommendations.
- **Using communication to foster positive working relationships.** This task includes listening, practicing good etiquette, resolving conflicts respectfully, and communicating with people from diverse backgrounds.

Critical thinking is the ability to evaluate evidence completely and objectively in order to form logical conclusions and make sound recommendations.



Screenshot of Microsoft Outlook 2018, ©Microsoft Corporation

Figure 1.2 Effective Professional Communication
At first glance, the first email message looks like a reasonable attempt at communicating with the members of a project team. However, review the blue annotations to see just how many problems the message really has.



Figure 1.3 Elements of Professionalism
To be respected as a true professional, develop these six qualities.

- **Representing your employer in the public arena.** Employers expect you to act responsibly and professionally on social media and in other venues and to follow accepted standards of grammar, spelling, and other aspects of quality writing and speaking.
- **Efficiently using the tools that your employer provides.** Aside from in-person conversations and meetings, every instance of business communication involves some level of technological assistance, so employers expect a level of proficiency with the tools they provide you to use.

MOBILE APP
Pocket collects online content you'd like to read or view later and syncs it across your mobile devices.

You'll have the opportunity to practice these skills throughout this course, but don't stop there. Successful professionals continue to hone communication skills throughout their careers.

COMMUNICATING IN AN ORGANIZATIONAL CONTEXT

In addition to having the proper skills, you need to learn how to apply those skills in the business environment, which can be quite different from the social and scholastic environments you are accustomed to. Every organization has a **formal communication network**, in which ideas and information flow along the lines of command (the hierarchical levels) in the company's organization structure (see Figure 1.4).

The *formal communication network* mirrors the company's organizational structure.

Throughout the formal network, information flows in four directions. *Downward communication* flows from top executives to middle managers to frontline employees, conveying executive decisions and providing information that helps employees do their jobs. *Upward communication* flows in the opposite direction, from employees to middle managers to top executives, giving those at high levels insight into problems, trends, opportunities, grievances, and performance. *Horizontal* or *lateral communication* flows between departments to help employees share information, coordinate tasks, and solve

APPLY YOUR SKILLS NOW

Practice Your Professionalism

Don't wait until you're on the job to develop your professionalism. College gives you many opportunities to hone your approach to work. The sooner you can get in sync with the professional work environment, the sooner you are likely to succeed in your first job and position yourself for a promotion. If you are already working or have worked in a business setting, think about the ways you could make an even stronger impression and fine-tune your skills.

Here are three opportunities to pursue now:

- **Communication with your instructors.** If you have ever started an email message to an instructor with "Yo, prof," now would be a good time to up your game. Imagine you are communicating with a high-level executive or someone else whose opinion of you will have a huge impact on your career advancement. You don't have to be stiff and overly formal; read the situation based on how each instructor communicates with you. Use a respectful greeting (ask your instructors how they would like to be greeted in person and in writing, if they haven't already told you), complete sentences, and standard punctuation.
- **The quality of your work.** Everything you produce reflects your commitment to quality, in both substance and presentation. Get in the habit of doing your best work now, and it will be second nature by the time you're getting paid to do it.
- **Scheduling and commitments.** Missing deadlines on the job can mean missing major career opportunities. Meeting your commitments requires the ability to estimate how long things will take (which comes with practice and careful planning) and the mental strength to power through the tough parts of a project. See "Think Now, Write Later" on page 147 for advice on how to prevent last-minute surprises when you're staring down a deadline.

COACH YOURSELF

1. How would you rate the quality of your interactions with your instructors? What could you do to improve communication?
2. Do you feel awkward when communicating at a more formal level than you are accustomed to in your personal or social life? What steps can you take to get comfortable with "professional-grade" communication before you graduate?

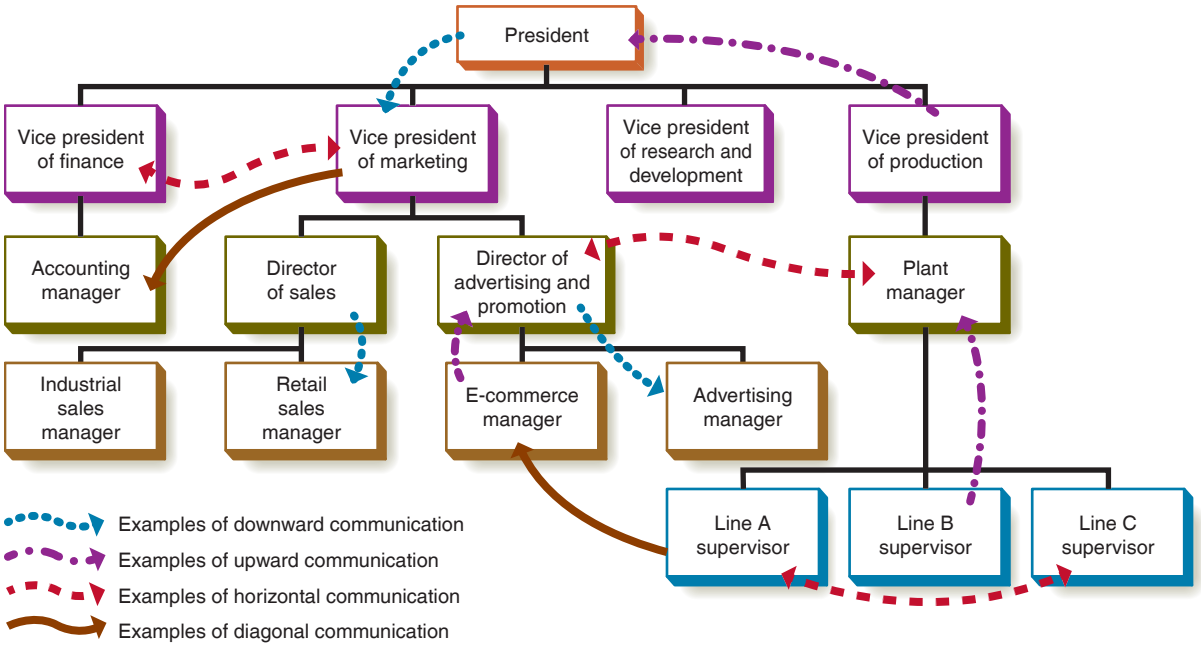


Figure 1.4 Formal Communication Network

The formal communication network is defined by the relationships between the various job positions in the organization. Messages can flow upward (from a lower-level employee to a higher-level employee), downward (from a higher-level employee to a lower-level employee), horizontally (across the organization, between employees at the same or similar levels), or diagonally (across departments and upward or downward).

complex problems. Finally, with *diagonal communication*, information crosses department lines while moving up or down.[6] When problems and opportunities span multiple departments, horizontal and diagonal flows can help ensure that communication doesn't get stifled moving up and down the vertical lines in the organization chart.[7]

The *informal communication network* encompasses all communication that occurs outside the formal network.

Every organization also has an **informal communication network**, which encompasses all communication that occurs outside of formal channels. Some of this informal communication takes place naturally when employees interact on the job and in social settings, and some of it takes place when the formal network doesn't provide information that employees want. In fact, the limitations of formal communication networks helped spur the business use of social media. Communication in the informal network is healthy and important because the formal network can't always capture and share all the information that helps people do their jobs. However, if a workplace is rife with rumors and gossip, this situation could be a sign that the formal network is not functioning effectively.

ADOPTING AN AUDIENCE-CENTERED APPROACH

The *audience-centered approach* involves understanding, respecting, and meeting the needs of your audience members; it is also known as adopting the *"you" attitude*.

An **audience-centered approach** involves understanding and respecting the members of your audience and making every effort to get your message across in a way that is meaningful to them. This approach is also known as adopting the **"you" attitude**, where "you" is the person receiving the message, in contrast to messages that are about "me" as the sender. Learn as much as possible about the beliefs, education, status, communication style, and personal and professional concerns of your readers and listeners. If you're addressing people you don't know and you're unable to find out more about them, try to project yourself into their position by using common sense and imagination.

Relating to the needs of others is a key part of *emotional intelligence*, the ability to read other people's emotions accurately and to manage one's own emotions in productive ways.[8] The more you know about the people you're communicating with, the easier it will be to focus on their needs—which, in turn, will make it easier for them to hear your message, understand it, and respond positively. A vital element of audience-centered communication is professional etiquette, which you'll study in Chapter 2.

Exploring the Communication Process

3 LEARNING OBJECTIVE
Contrast the conventional communication process model with the social communication model.

Viewing communication as a process helps you identify steps you can take to improve your success as a communicator.

You know from your own experience that even with the best intentions, communication efforts can fail. Messages can get lost or ignored. The receiver of a message can interpret it in ways the sender never imagined. Two people receiving the same information can reach different conclusions about what it means.

Fortunately, by understanding communication as a process with distinct steps, you can improve the odds that your messages will reach their intended audiences and produce their intended effects. This section explores the communication process in two stages: first by following a message from one sender to one receiver in the conventional communication model and then by expanding on that approach with multiple messages and participants in the social communication model. (A note on terminology: Throughout the book, *message* is used in both the general sense of "a bundle of information," regardless of form, and the specific sense of instant messages or other brief message formats.)

THE CONVENTIONAL COMMUNICATION MODEL

By viewing communication as a process (Figure 1.5), you can identify and improve the skills you need to be more successful. Many variations on this process model exist, but these eight steps provide a practical overview:

1. **The sender has an idea.** Whether a communication effort will ultimately be effective starts right here and depends on the nature of the idea and the motivation for sending it. For example, if your motivation is to solve a problem, you have a better chance of crafting a meaningful message than if your motivation is merely to complain.

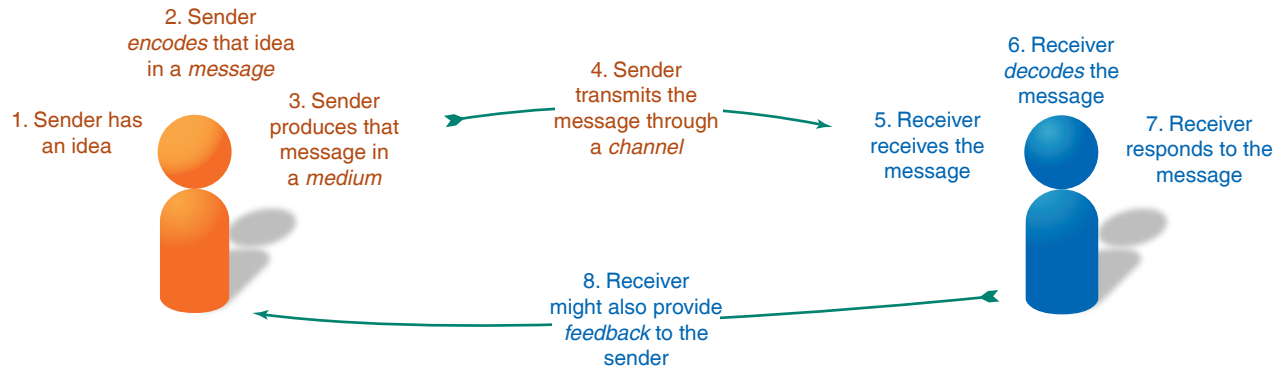


Figure 1.5 The Conventional Communication Process
This eight-step model is a simplified view of one cycle of communication. In reality, the process is complicated with noise, barriers, and interruptions, but understanding the basic concepts of encoding and decoding will help you as a sender and as a receiver.

2. **The sender encodes the idea as a message.** When someone puts an idea into a **message**—which you can think of as the "container" for an idea—he or she is **encoding** it, or expressing it in words or images. Much of the focus of this course is on developing the skills needed to encode your ideas into effective messages.

When senders *encode* ideas into *messages*, they express those ideas in words or images.

3. **The sender produces the message in a transmittable medium.** With the appropriate message to express an idea, the sender now needs a **communication medium** to present that message to the intended audience. Media can be divided into oral (spoken), written, or visual formats.

The *communication medium* is the form a message takes; the *communication channel* is the system used to deliver the message.

4. **The sender transmits the message through a channel.** Technology continues to increase the number of **communication channels** you can use to transmit your messages. The distinction between medium and channel can get a bit murky, but think of the medium as the *form* a message takes (such as a written message) and the channel as the system used to *deliver* the message (such as Twitter or email). (Reflecting common usage and as a matter of convenience, this book occasionally uses the terms *digital media* and *social media* to refer to categories of channels that can transmit oral, written, and visual messages.)
5. **The audience receives the message.** If the channel functions properly, the message reaches its intended receivers in the target audience. However, mere arrival at the destination is no guarantee that the message will be noticed or understood correctly. As "How Audiences Receive Messages" (page 13) explains, many messages are either ignored or misinterpreted.
6. **The audience decodes the message.** After a message is received, the receiver needs to extract the idea from the message, a step known as **decoding**. "How Audiences Decode Messages" (pages 13–14) takes a closer look at this complex and subtle step in the process.

When receivers *decode* messages, they extract meaning from the words or images they've received.

7. **The audience responds to the message.** By crafting messages in ways that show the benefits of responding, senders can increase the chances that recipients will respond in positive ways. However, as "How Audiences Respond to Messages" (page 14) points out, whether a receiver responds as the sender hopes depends on the receiver (a) *remembering* the message long enough to act on it, (b) being *able* to act on it, and (c) being *motivated* to respond.
8. **The audience provides feedback to the sender.** In addition to responding (or not responding) to the message, audience members may give **feedback** that helps the sender evaluate the effectiveness of the communication effort. Feedback can be verbal (using written or spoken words), nonverbal (using gestures, facial expressions, or other signals), or both. Just like the original message, however, this feedback from the receiver also needs to be decoded carefully. A smile, for example, can have many meanings.

Feedback is a reaction from the receiver back to the original sender that can offer clues about how successful the original message was.

Keep in mind that this description captures only one cycle of the communication process. A conversational exchange (in person, on the phone, or through a digital channel)

could include dozens of these cycles before the sender and the receiver achieve a satisfactory transfer of information and understanding.

Considering the complexity of this process—and the barriers and distractions that often stand between sender and receiver—it should come as no surprise that communication efforts often fail to achieve their objective. Fortunately, the better you understand the process, the more successful you'll be.

The following sections take a closer look at two important aspects of the process: environmental barriers that can block or distort messages and the steps audiences take to receive, decode, and respond to messages.

BARRIERS IN THE COMMUNICATION ENVIRONMENT

Communication barriers can block or distort messages before they reach the intended audience.

Within any communication environment, messages can be disrupted by a variety of **communication barriers**. These barriers include noise and distractions, competing messages, filters, and channel breakdowns:

- **Noise and distractions.** External distractions range from uncomfortable meeting rooms to reminders popping up on your screen while you're trying to write or read. Internal distractions are thoughts and emotions that prevent audiences from focusing on incoming messages. The common habit of *multitasking*—attempting more than one task at a time—is practically guaranteed to create barriers when communication is involved because the human brain simply isn't wired to work that way. You may think you are doing two or more tasks at once, but you are really shifting back and forth between individual tasks, and your productivity and focus can suffer every time you shift.[9] As more communication takes place on mobile devices in busy environments, the need to insulate yourself from noise and distractions will keep growing.
- **Competing messages.** Having your audience's undivided attention is a rare luxury. In most cases, you must compete with other messages that are trying to reach your audience at the same time.
- **Filters.** Messages can be blocked or distorted by *filters*, which are any human or technological interventions between the sender and the receiver. Filtering can be intentional (such as automatically filing incoming email messages based on sender or content) or unintentional (such as an overly aggressive spam filter that traps legitimate emails). The structure and culture of an organization can also inhibit the flow of vital messages. And, in some cases, the people or companies you rely on to deliver a message can distort it or filter it to meet their own needs.
- **Channel breakdowns.** Sometimes the channel simply fails to deliver your message at all. A colleague you were counting on to forward a message to your boss might have forgotten to do so, for instance.

Minimizing barriers and distractions in the communication environment is everyone's responsibility.

Everyone in an organization can help minimize barriers and distractions. When preparing messages, be aware of any barriers that could prevent those messages from reaching their intended audiences. If you move into management, keep an eye out for any organizational barriers that could be inhibiting the flow of information. In any situation, a small dose of common sense and courtesy goes a long way. Mute your phone before stepping into meetings, don't talk across the tops of other people's cubicles, and don't play music at a level that can distract others.

Finally, take steps to insulate yourself from distractions. Don't let messages interrupt you every minute of the day. Instead, set aside time to attend to messages all at once so that you can focus the rest of the time.

INSIDE THE MIND OF YOUR AUDIENCE

After a message works its way through the communication channel and reaches the intended audience, it encounters a whole new set of challenges.

How Audiences Receive Messages

To truly receive a message, audience members need to sense it, select it, and then perceive it as a message.

For an audience member to receive a message, three events need to occur: The receiver must *sense* the presence of a message, *select* it from all the other messages clamoring for attention, and *perceive* it as an actual message (as opposed to random, pointless noise).[10] You can appreciate the magnitude of this challenge by walking down any busy street in a commercial section of town. You will encounter hundreds of messages—billboards, posters, store window displays, car stereos, people talking, car horns, street signs, traffic lights, and so on. However, you will sense, select, and perceive only a fraction of these messages.

Selection attention is focusing on a subset of incoming stimuli or messages while ignoring others; it can cause intended recipients to block out some or all of your message.

Today's business audiences are much like pedestrians on busy streets. They are inundated with so many messages and so much noise that they can miss or ignore many of the messages intended for them. One of the mind's defenses against this barrage is **selective attention**, which is focusing on a subset of the incoming stimuli or information sources and ignoring others.[11] Not surprisingly, this focused attention can be helpful at times and harmful at others. If you are on your mobile phone trying hard to hear the other party, your mind will try to block out all the noise sources—one of which might be a car horn warning you to get out of the way.

Throughout this course, you will learn a variety of techniques to craft messages that get noticed. In general, follow these five principles to increase your chances of success:

To improve the odds that your messages will be successfully perceived by your audience, pay close attention to expectations, ease of use, familiarity, empathy, and technical compatibility.

- **Consider audience expectations.** Deliver messages using the media and channels that the audience expects. If colleagues expect meeting notices to be delivered by email, don't suddenly switch gears and start delivering the notices via blog posts without telling anyone. Of course, sometimes going *against* expectations can stimulate audience attention, which is why advertisers sometimes do wacky and creative things to get noticed. For most business communication efforts, however, following the expectations of your audience is the most efficient way to get your message across.
- **Make messages user-friendly.** Even if audiences are actively looking for your messages, they may not get the messages if you make them hard to find, hard to navigate, or hard to read.
- **Emphasize familiarity.** Use words, images, and designs that are familiar to your audience. For example, company websites usually put information about the company on a page called "About" or "About Us," so today's audiences expect to see such information on a page with this title.
- **Practice empathy.** Make sure your messages speak to the audience by clearly addressing *their* wants and needs—not just yours. This is the essence of the "you" attitude.
- **Design for compatibility.** Make sure your messages are compatible with the devices your audiences will use to read, listen to, or view them. For example, websites designed for full-size computer screens can be difficult to view on mobile devices, so contemporary web design emphasizes the need to support a wide variety of screen sizes and modes of interaction.

How Audiences Decode Messages

Decoding is a complex process; receivers often extract different meanings from messages than senders attempted to encode in their messages.

A received message doesn't "mean" anything until the recipient decodes it and assigns meaning to it, and there is no guarantee the receiver will assign the same meaning that the sender intended. Assigning meaning through decoding is a highly personal process influenced by culture, individual experience, learning and thinking styles, ego, hopes, fears, beliefs, and even moods.

Our minds have a variety of self-defense mechanisms that protect our perceptions of the world and of ourselves, and they sometimes ignore, deny, or distort incoming information that threatens those views. If you have ever used the phrase "You only hear what you want to hear," you were referring to an example of this distorted perception. For

It's human nature to protect our views of the world and of ourselves, even to the extent of ignoring or distorting incoming information to fit our preconceived notions of reality.

example, if you ask four people to review a business plan that you believe is brilliant, and three of the appraisals come back positive, your ego will be tempted to reject the negative comments in the fourth review.

Differences in language and usage also influence received meaning. If you ask an employee to send you a report "as soon as possible," does that mean within 10 seconds, 10 minutes, or 10 days? By clarifying expectations and resolving potential ambiguities in your messages, you can minimize such uncertainties.

Individual thinking styles are another important factor in message decoding. For instance, someone who places a high value on objective analysis and clear logic might interpret a message differently than someone who values emotion or intuition (reaching conclusions without using rational processes).

In general, the more experiences you share with another person, the more likely you are to share your perceptions of the world and therefore arrive at the same meanings for a given message (see Figure 1.6). Careful audience analysis helps you understand how much of this overlap you have with your readers or listeners. The less shared experience you have with your audiences, the more background information and context you will need to provide in your messages.

How Audiences Respond to Messages

Let's assume your message has been delivered, received, and correctly decoded. Now what? Will audience members respond in the way you'd like them to? Only if three events occur.

Audiences will likely respond to a message if they remember it, if they're able to respond, and if they're properly motivated to respond.

First, the recipient must *remember* the message long enough to act on it. Simplifying greatly, memory works in several stages: *Sensory memory* momentarily captures incoming data from the senses, and then whatever sensory data the recipient pays attention to are transferred to *short-term memory*. Information survives in short-term memory for only a matter of seconds and will disappear or get crowded out by new information if it isn't transferred to *long-term memory*. This transfer can be done either actively (such as when a person memorizes a list of items) or passively (such as when a new piece of information connects with something else the recipient already has stored in long-term memory). Finally, the information needs to be *retrieved* when the recipient wants to act on it.[12] By communicating in ways that reflect the audience's wants and needs, you increase the chance that your messages will be remembered and retrieved.

Second, the recipient must to be *able* to respond as you wish. Obviously, if recipients simply cannot do what you want them to do, they will not respond according to your plan. By understanding your audience (you'll learn more about audience analysis in Chapter 4), you can minimize these unsuccessful outcomes.

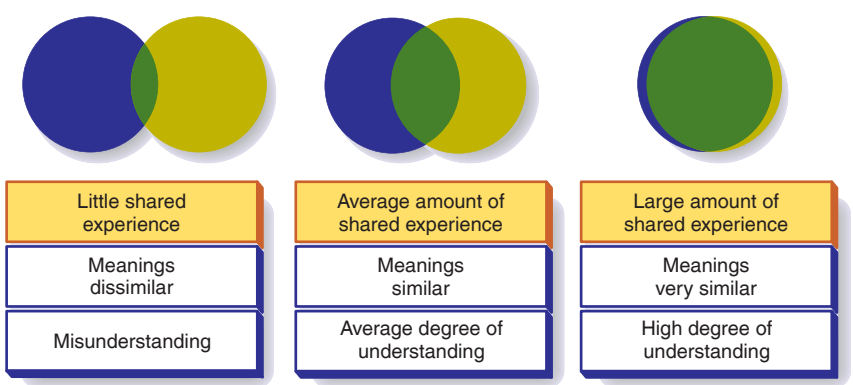


Figure 1.6 How Shared Experience Affects Understanding
The more two people or two groups of people share experiences—personal, professional, and cultural—the more likely it is that receivers will extract the intended meanings that senders encode into the messages.

Third, the recipient must be *motivated* to respond. You'll encounter many situations in which your audience has the option of responding but isn't required to. For instance, a record company may or may not offer your band a contract, or your boss may or may not respond to your request for a raise. Throughout this course, you'll learn techniques for crafting messages that can help motivate readers to respond positively to your messages.

By explaining how audiences will benefit by responding positively to your messages, you'll increase their motivation to respond.

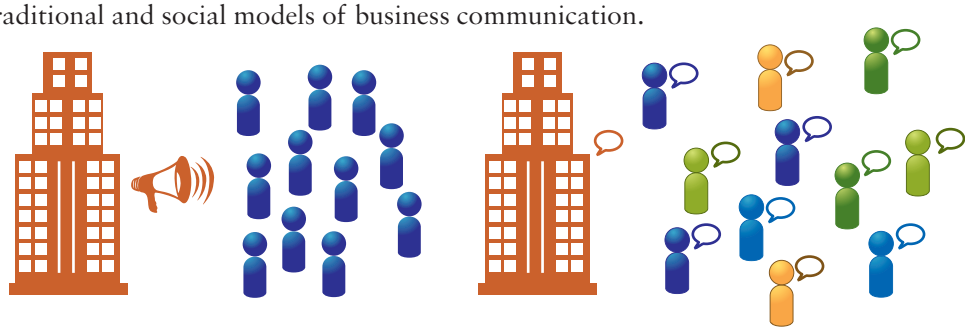
THE SOCIAL COMMUNICATION MODEL

The conventional model presented in Figure 1.5 illustrates how a single idea moves from one sender to one receiver. In a larger sense, it also helps represent the traditional nature of business communication, which was primarily defined by a *publishing* or *broadcasting* mindset. Externally, a company issued carefully scripted messages to a mass audience that often had few options for responding to those messages or initiating conversations on their own. Customers and other interested parties had few ways to connect with one another to ask questions, share information, or offer support. Internally, communication tended to follow the same "we talk, you listen" model, with upper managers issuing directives to lower-level supervisors and employees.

However, in recent years, a variety of technologies have enabled and inspired a new approach to business communication. In contrast to the publishing mindset, this **social communication model** is interactive, conversational, and usually open to all who wish to participate. Audience members are no longer passive recipients of messages but active participants in a conversation. Social media have given customers and other stakeholders a voice they did not have in the past.

The *social communication model* is interactive, conversational, and usually open to all who wish to participate.

Instead of transmitting a fixed message, a sender in a social media environment initiates a conversation by asking a question or sharing valuable information. Information spread this way is often revised and reshaped by the participants as they forward it and comment on it. People can expand it, confirm it, amplify it, or refute it, depending on their needs and interests. Figure 1.7 lists some of the significant differences between the traditional and social models of business communication.



Conventional Communication: "We Talk, You Listen"	**The Social Model: "Let's Have a Conversation"**
Tendencies	**Tendencies**
Publication, broadcast	Conversation
Lecture	Discussion
Intrusion	Permission
Unidirectional	Bidirectional, multidirectional
One to many; mass audience	One to one; many to many
Control	Influence
Low message frequency	High message frequency
Few channels	Many channels
Information hoarding	Information sharing
Static	Dynamic
Hierarchical	Egalitarian
Structured	Amorphous
Isolated	Collaborative
Planned	Reactive
Resistive	Responsive

Figure 1.7 The Social Communication Model
The social communication model differs from conventional communication strategies and practices in a number of significant ways.

Social communication has two potential disadvantages for business: less control over messages and greater complexity.

The social communication model offers many advantages, but it has some disadvantages as well, starting with less control. People inside and outside a company have always been able to refute management statements or spread rumors, for example, but owners and managers could assert at least a degree of control because the options for everyone else were limited and often expensive. Now that more stakeholders have a say in the conversation via social media, they can use the megaphone power of the crowd to shape public perceptions in significant ways, such as arranging boycotts of companies whose policies they disagree with or influencing where and how companies advertise. Once a message gets out in the "wild," it can be amplified, distorted, or misused in ways the original sender never envisioned.

A second potential disadvantage of the social model is complexity. Companies and individuals have access to more information than ever before, which is both positive and negative. On the negative side, there are more communication channels to monitor, more work is needed to separate valuable information from noise, there is a greater risk of the spread of false information, and there is a greater threat of information overload (see page 17).

Using Technology to Improve Communication

4 LEARNING OBJECTIVE
Identify five major benefits of business communication technology and three major innovations that are reshaping the practice of communication.

Contemporary business communication is a technology-enabled activity, and your success as a communicator will depend on your comfort and skill with the tools you'll have at your disposal. You are already using some of these tools, and you will be able to adapt your experience with various forms of digital and social media to workplace communication.

THE POTENTIAL BENEFITS OF COMMUNICATION TECHNOLOGY

The potential benefits of communication technology include
- Greater effectiveness
- Greater efficiency
- Better and easier research
- Improved decision-making
- Fewer barriers

Technology brings a wide variety of potential benefits to business communication, which can be grouped into five key areas:

- Making communication more effective by helping people craft messages that convey their ideas more clearly and persuasively
- Making communication more efficient by reducing the time and effort needed to create, transmit, and consume messages
- Improving research to help communicators discover, process, and apply information
- Assisting communicators with decision-making by guiding them through complex sets of data
- Removing communication barriers so more people can participate in the communication process more easily

MOBILE APP
RescueTime keeps track of how you spend your time and lets you know if you're losing too much of your day to social media and other distractions.

You probably take advantage of many benefits provided by communication technology already, from spell checkers to search engines to a voice-input virtual assistant on a smartphone. Throughout this book, you'll see examples of both simple and esoteric technologies that deliver these benefits, including in the special feature on pages 20–23, "Empowering Communicators with Intelligent Communication Technology."

While technology can help communicators in some powerful ways, these benefits don't come automatically. When tools are designed poorly or used inappropriately, they can hinder communication more than help. To use communication technology effectively, bear these five points in mind:

- **Keep technology in perspective.** Any technology is simply a tool, a means by which you can accomplish certain tasks. Technology is an aid to communication, not a replacement for it. Moreover, it can get in the way if not used thoughtfully. Throughout this book, you'll see advice on keeping the focus on your messages and

your audiences and on using technology to enhance the communication process without overwhelming it.

- **Guard against information overload.** The overuse or misuse of communication technology can lead to **information overload**, in which people receive more information than they can effectively process. Information overload can cause distractions, stress, mistakes, and communication breakdowns, and minimizing it is a shared responsibility. As a receiver, be your own gatekeeper and stay mindful of what information you allow in. Periodically "prune" your information channels to avoid material you no longer need, and use filtering features in your systems to isolate high-priority messages that deserve your attention. As a sender, make sure you don't send unnecessary messages or poorly crafted messages that require multiple rounds of clarification.
- **Use your tools wisely.** Facebook, Twitter, YouTube, and other communication technologies are key parts of what has been called the *information technology paradox*, in which information tools can waste as much time as they save. In addition to distracting employees from work responsibilities, inappropriate use can also leave companies vulnerable to lawsuits and security breaches.
- **Use your tools efficiently.** Knowing how to use your tools efficiently can make a big difference in your productivity. You don't have to become an expert in most cases, but you do need to be familiar with the basic features and functions of the tools you are expected to use on the job. As a manager, make sure your employees are trained to use the systems you expect them to use.
- **Reconnect with people.** Even when it is working well, communication technology can still present barriers to understanding and healthy emotional connections. Messaging, email, and other text-heavy modes are particularly prone to misunderstandings and bruised feelings because they can't convey nuances and emotions the same way that voice, video, and in-person conversation can. Whenever you sense that you're stuck in a loop of confusion or negativity, pick up the phone or visit the other party in person if you can. A few minutes of direct conversation can often work wonders.

Information overload occurs when people receive more information than they can effectively process.

THE SPECTRUM OF CONTEMPORARY COMMUNICATION TECHNOLOGY

This section offers a look at three sets of technology that you will encounter in your job search and in the workplace: social and workgroup communication systems, mobile communication, and intelligent communication technologies.

Social and Workgroup Communication Systems

One of the most distinguishing features of business communication these days is how connected everyone and everything is. Businesses have had access to digital networking for decades, and many were quick to adopt social networking concepts when Facebook and similar networks took off.

Social media are digital platforms that empower stakeholders as participants in the communication process by allowing them to share content, revise content, respond to content, or contribute new content. Millions of companies now use public networks such as Facebook and Twitter to connect with customers, and many also have private, internal social networks that are restricted to employees and selected business partners. These private systems are often enhanced with shared file access, group messaging, and real-time collaboration capabilities for brainstorming, reviewing and revising documents, and virtual meetings. If you use social media now, you have a basic familiarity with how many of these systems work. You can read more about collaboration systems in Chapter 2 and business uses of social networking in Chapter 8.

Social media empower stakeholders as participants in the communication process by allowing them to share content, revise content, respond to content, or contribute new content.

Mobile Communication

While social media tools are freeing communication from the constraints of closed networks, mobile connectivity is freeing it from the constraints of fixed locations. With mobile devices everywhere you look these days, it probably comes as no surprise that mobile

media consumption has skyrocketed in recent years; more than half of all internet access now occurs via mobile devices.[13]

Mobile technology has become an essential part of the digital workplace.

Moreover, this shift isn't just about consumer usage and entertainment. For a growing number of companies, mobile technology has become an essential part of the digital workplace. Mobile connectivity can give workers and companies greater flexibility, enhance productivity and collaboration, and create more-engaging experiences for customers and other users. And rather than being an accessory to or an extension of a traditional work computer, in many cases mobile devices are the primary interface that connects employees to the company's information networks.[14]

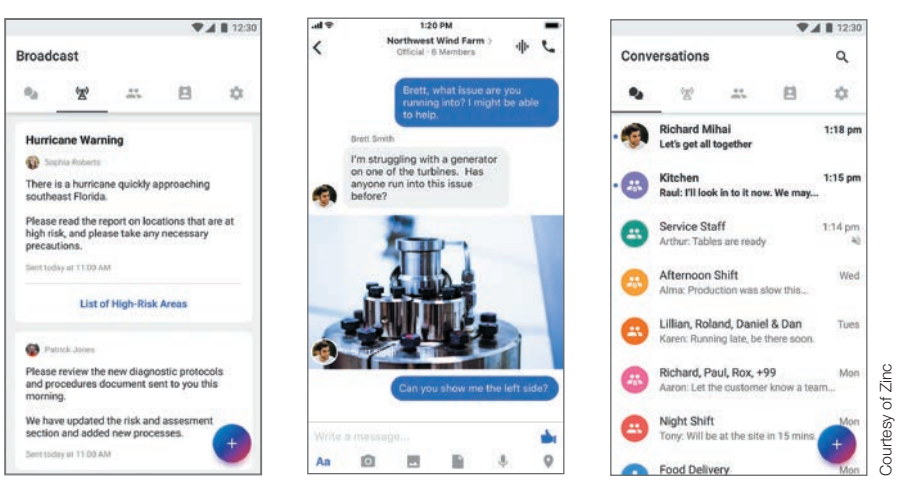
Business mobile communication involves many of the same communication tools that you may use now for messaging, social networking, researching, and writing. In addition, thousands of business-focused apps assist users with everything from presentations to project management to financial reporting. Many of these apps are either communication focused or have significant communication features, all designed to help employees stay connected no matter where their work takes them (see Figure 1.8). For example, with Rockwell Automation's FactoryTalk TeamONE app, teams can collaborate to diagnose problems on a production line using the app's measurement capabilities to acquire data from machinery and then using its communication tools in the troubleshooting process.[15]

Reading and writing are generally more difficult and prone to errors on smaller mobile screens.

The rise of mobile communication has some obvious implications, starting with the challenges of writing and reading on small screens. Documents that are easy to read on paper or on large screens can become quite difficult to read on a smartphone—and the more difficult the reading experience, the more likely that readers will misinterpret the message or simply stop reading. The trend toward larger phones (sometimes known as *phablets* because they fall somewhere between the size of conventional smartphones and tablets[16]) offers some relief, but even these devices present challenges for reading and writing.

Mobile technology alters the way people live and work, which requires communicators to modify their approach.

Moreover, device size and portability are only the most obvious differences. Just as with social media, the changes brought about by mobile communication go far deeper than the technology itself. Mobile connectivity and computing alter the way people live and work, which requires communicators to modify their approach to writing and designing messages. For example, smartphones have become truly personal devices in ways that personal computers never did. For many users, the connection is so intense they may feel a sense of panic when they don't have frequent access to their phones.[17] When people are closely attached to their phones, day and night, they are more closely connected to all the information sources, conversations, and networks that those phones can reach. As a result, mobile communication can start to resemble a continuous stream of conversations that never quite end, which influences the way businesses need to interact with their stakeholders.



Courtesy of Zinc

Figure 1.8 Mobile Communication Tools

Mobile technologies offer multiple ways to improve communication and other key business processes. To meet the needs of *deskless* workers, for example, this system from Zinc unifies everything from training materials to group messaging in a single app so that everyone in a company has instant access to information and advice.

You can read more about writing for mobile audiences in Chapter 5 and designing mobile-friendly messages in Chapter 6. Throughout the book, you'll also see advice on using mobile devices for specific tasks, such as presentations and job searches.

Intelligent Communication Technology

The most intriguing and potentially disruptive of all contemporary communication tools are a group of capabilities called **intelligent communication technology** (**ICT**), which uses artificial intelligence to enhance the communication experience. Although "artificial intelligence" still has a science fiction ring to it, forms of AI are now used extensively in business and business communication. It's a virtual guarantee that you are already experiencing AI as a consumer—Amazon, Apple, Facebook, Google, Microsoft, Netflix, and Spotify are just a few of the companies that rely on AI to deliver their services.[18] In a professional context, you will probably use various forms of AI on the job, and chances are good that you will encounter it during your job search process (although its use may not be visible to you).

Intelligent communication technology (ICT) uses artificial intelligence to enhance the communication experience.

Research in AI has been going on for more than a half-century, but the practical outcomes never really lived up to hopes until recently, when several developments converged within the space of a few years. First, the primary focus of the research shifted from pursuing the generalized, humanlike intelligence of science fiction (sometimes called *general AI* or *strong AI*) to developing specialized systems aimed at handling specific tasks such as reading text or recognizing images (called *narrow AI* or *weak AI*). Second, an AI method involving *neural networks*, which emulate the function of neurons in the brain, was refined in a way that made it much more powerful. And third, several vital computer capabilities became available around the same time: massive sets of data that AI systems could learn from, low-cost storage to handle all that data, and fast processors capable of handling the number-crunching that the most common AI approaches require.[19] Thanks to these developments, commercial applications of AI are exploding, and many of these involve business communication.

Commercial use of AI is expanding rapidly, and much of this use involves business communication.

ICT in its various forms relies on a few fundamental AI techniques that you'll hear about from time to time. You don't necessarily need to know how any of these techniques work, but it helps to have an idea of the capabilities they bring to communication:

- **Machine learning and deep learning.** For any AI system to possess intelligence, it needs to be able to learn, which can include understanding text, converting spoken language to written text, or recognizing the content of photographs and videos. *Machine learning* refers to the general capability of computers to learn, and *deep learning* is a specific type of machine learning that uses layers of neural networks to attack problems at multiple levels (the "deep" part). The growth of practical AI tools in recent years, including the ICT tools available for business communication, is largely the result of advances in deep learning.[20]
- **Natural language processing** (**NLP**). NLP aims to give computers the ability to understand language in the often-unpredictable ("natural") ways humans speak and write and to manipulate language in useful ways. NLP involves several challenging issues, including converting speech to text, analyzing text to extract intended meaning, and generating written or oral output (often referred to as *natural language generation*).[21]
- **Computer vision.** In much the same way that NLP pieces together sounds and bits of language to figure out meaning, computer vision analyzes the elements of photos, videos, and live camera images to identify their content. Given how important visual communication has become in business, vision processing is likely to play a key role in the future of business communication.

Machine learning is the general capability of computers to learn; *deep learning* is a specific type of machine learning that uses multiple layers of *neural networks*.

"Empowering Communicators with Intelligent Communication Technology" on pages 20–23 shows numerous examples of ICT tools used in business today. And throughout the book, keep an eye out for the "Intelligent Communication Technology" highlight boxes that discuss specific tools for business communication—including tools that you can use or that you might encounter while searching for your next job.

MOBILE APP

ColorNote for Android helps you capture and organize all the details of daily life, from assignments to job interview notes.

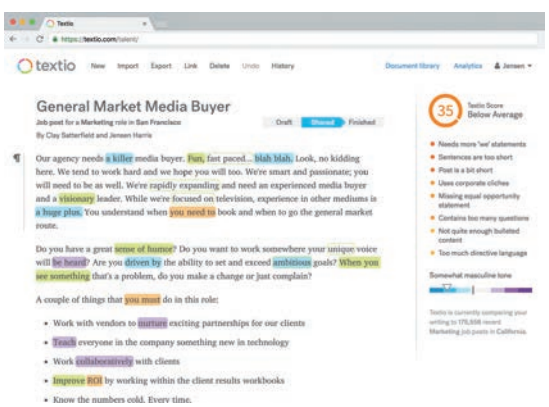
EMPOWERING COMMUNICATORS WITH INTELLIGENT COMMUNICATION TECHNOLOGY

Artificial intelligence is now being applied to nearly every facet of business, and many of these innovations focus on business communication. Here is a sample of the intelligent communication technologies that deliver the five key benefits listed on page 16. You have no doubt encountered some of these already, and you will probably encounter more of them during your job search and in the workplace.

Making Communication More Effective

These tools help communicators make more-compelling choices by offering suggestions and providing feedback or by enhancing the audience experience with additional information.

Augmented writing systems analyze word and phrase choices and suggest more effective ways to convey ideas. Some are based on general concepts of effective writing; others are specialized tools based on a deeper analysis of narrower sets of communication examples, such as job descriptions.



©Textio

Augmented reality tools enhance the communication experience for audiences by delivering additional information that is relevant to a user's immediate surroundings, such as systems that give technicians on-the-spot guidance to troubleshoot and repair equipment.



Courtesy of Panasonic

Making Communication More Efficient

The goal of these tools is to reduce the time and effort for both senders and receivers by assisting—or in some cases replacing—a human participant.

Applicant evaluation systems speed the process of screening job applications, particularly in the first few stages of the recruiting cycle, when companies often have more candidates than their staffs can screen manually. Some of these systems evaluate résumés and related application information to help recruiters identify the most promising candidates, and some can even predict whether people who aren't actively looking for a new job might be likely to consider one. Others assist at the interviewing stage, with chatbots that can conduct interviews or video analysis tools that evaluate candidates' responses and on-screen demeanor.



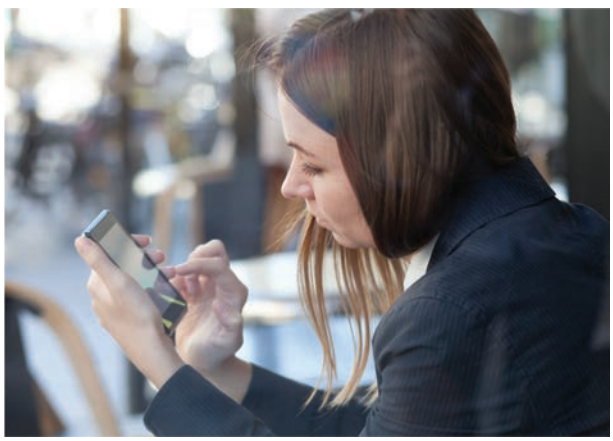
Courtesy of Engage Talent

Automated writing goes beyond augmented writing to produce finished or near-finished writing. Systems in use now can summarize corporate news and sports stories, for example. Yahoo! Sports uses AI to generate millions of personalized draft reports and game recaps for members of its fantasy football leagues.



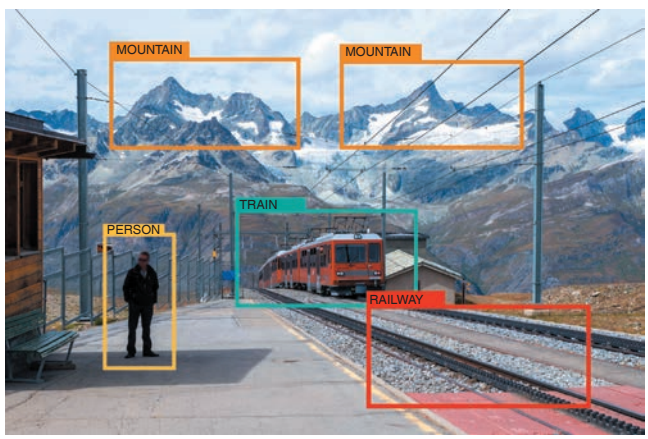
Yahoo Sports Daily Fantasy

Chatbots and taskbots interact with humans to perform a wide variety of communication functions, from answering questions about products to acting as personal assistants. Bots help companies communicate with more people at lower cost. The Gift Genie from Sam's Club, for instance, can guide customers through product selection questions and seamlessly escalate to human agents when needed. X.ai's Amy and Andrew taskbots can set up meetings and perform various other tasks as virtual assistants.



Conversable, Inc.

Image recognition systems extract information from photos, videos, and live camera images. Search engines, for example, use AI to automatically analyze and tag photos and videos for such purposes as filtering out objectionable content and helping users search for images. This capability can be built into other systems for such purposes as tracking products, counting people, and monitoring public safety.

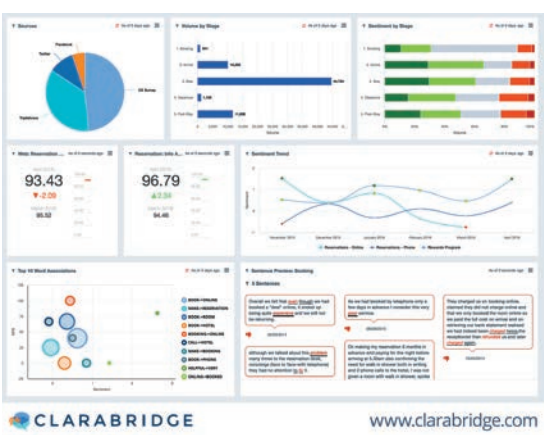


JIRAROJ PRADITCHAROENKUL / Alamy Stock Photo

Improving Research

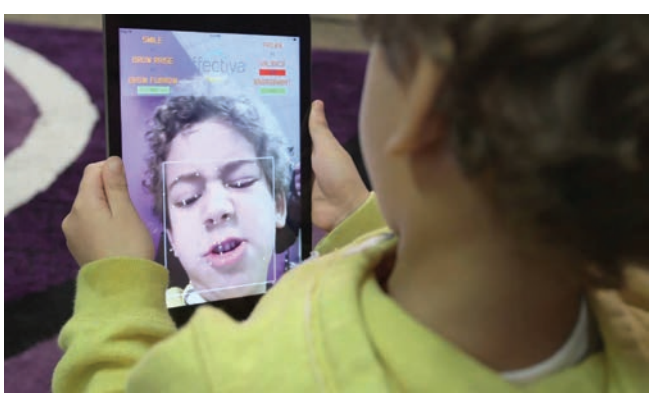
Business communication projects often require research, which can involve numerical data, textual content, or visuals (photos, videos, live camera feeds, and so on). When the research involves large amounts of material, ICT tools can help communicators by automating the collection and analysis tasks and by discovering connections and insights that might otherwise go unnoticed.

Mining and analytics systems are a diverse class of tools that extract insights from collections of numerical (*data mining*, *data analytics*) or textual (*text mining*, *text analytics*) content. Business communicators can use the natural language processing capability of text mining or text analytics for *social listening* to identify themes (such as prevailing customer sentiment or threats to a company's reputation) hidden in mountains of written information, from Twitter and Facebook posts to customer emails and surveys.



© Clarabridge

Emotion recognition tools such as Affectiva (see page 3) analyze facial expressions or voices to identify emotional states with the aims of understanding consumer reactions and preferences at a deeper level and bringing a more human feel to digital interaction.

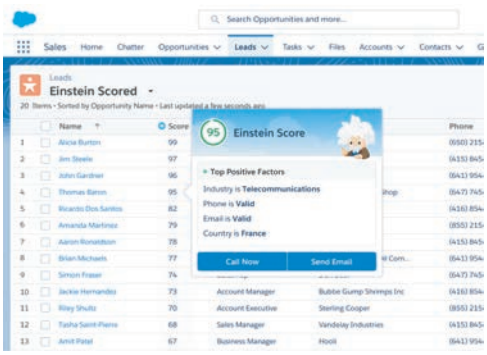


Courtesy of Affectiva

Enhancing and Automating Decision-Making

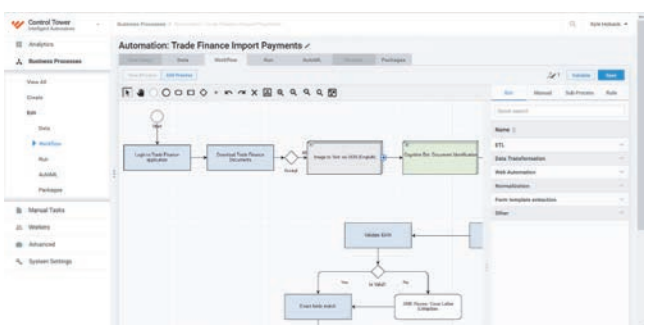
A variety of ICT solutions focus on decision-making, which relates closely to communication efforts because professionals frequently need to make decisions about communication, such as identifying which potential customers would be most likely to respond to a sales message.

Cognitive automation, also known as *augmented intelligence*, helps professionals make more-informed decisions by applying *predictive analytics* and other techniques to characterize likely outcomes of various decision choices.



Salesforce.com, https://www.sales-force.com/products/einstein/overview/

Robotic process automation (RPA) aims to do for knowledge work what robots do for manufacturing and other physical processes. RPA targets the high-volume "paperwork" aspects of business and can automate some of the routine communication and manual tasks that this sort of work typically involves.

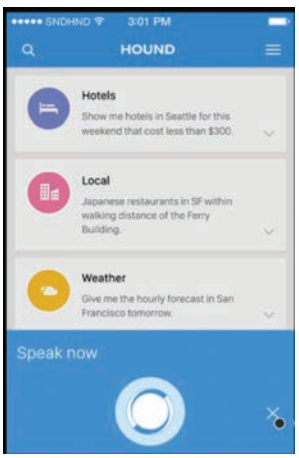


Courtesy of WorkFusion

Removing Communication Barriers

A variety of AI-enabled tools lower or remove communication barriers by simplifying the process of human-computer interaction or creating experiences that aren't possible in the physical world.

Voice recognition has improved dramatically in the last few years, thanks to advances in AI. Voice input is so good now that it is becoming the primary way for millions of people to interact with digital tools and the internet in general.

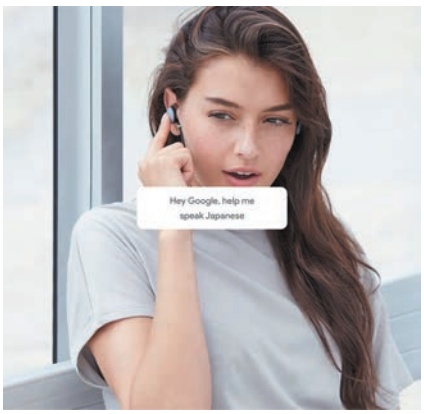


Courtesy of Sound Hound

Automated translation tools remove language barriers for website visitors and users. Companies can dramatically lower the costs of *localizing* content for various countries and language users, and anyone can get reasonably close translations of website content using Google Translate and similar services.



Real-time voice translation (see next page) addresses the multiple challenges of recognizing speech, converting it to text in the original language, translating it to a second language, and then synthesizing voice output in that language.



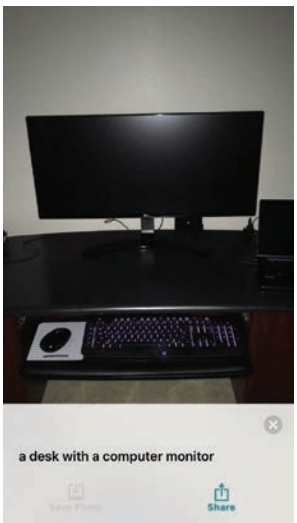
Courtesy of Google

Virtual reality (VR) systems create a simulation in which the person experiences the sensation of being in an environment, even though that environment is entirely computer-generated. If it is difficult, expensive, or dangerous to put people in a real-life situation, a VR simulation can let employees experience the sensation of being there and doing whatever tasks are required. VR can also help people experience a product or structure before it is built. Ford uses VR to let engineers "see" design ideas before building anything and to get feedback from drivers by letting them sit in and experience prototype designs before the cars are manufactured.



Ford Motor Company

Augmented ability tools help people across a wider spectrum of physical or cognitive ability interact with devices and their immediate environments in more complete and fulfilling ways. For example, Microsoft's Seeing AI app can help people with limited vision by reading texts, recognizing currency, identifying people, scanning barcodes, and identifying objects (as in the photo to the right).



Essential ICT Terms

Artificial Intelligence (AI) The application of computing power to replicate one or more aspects of human intelligence. Generally speaking, it's a three-stage process: collecting data or information, analyzing or processing that input to make decisions, then applying the results of that decision-making activity.

Strong AI, Weak AI Terms that suggest the scope of an AI activity or design. *Strong AI*, also known as *artificial general intelligence (AGI)*, is the idea of comprehensively replicating human intelligence, including the ability to transfer learning from one task or domain to another, just as humans can. *Weak AI*, or more accurately, *narrow AI*, focuses on a specific problem with techniques optimized for that single domain. All the AI tools having a meaningful impact on business today are weak AI.

Machine Learning General term for a system's ability to teach itself to improve at whatever task or tasks it is designed to do, in contrast to systems in which all the intelligence has been built in by human programmers.

Deep Learning A form of machine learning in which layers of computational *neural networks* mimic the functions of the brain's neurons. Deep learning is a key component of the communication tools in place today.

Augmented Intelligence, Hybrid Intelligence, Cognitive Automation Similar terms to describe hybrid solutions in which computers assist humans, and vice versa. For example, an AI system might analyze a collection of data to help a human make a decision, or a system that runs autonomously most of the time might call for human advice when it encounters a problem it can't solve.

Natural Language Processing (NLP) The ability to understand, analyze, and respond to human conversational input. Systems that accept voice input, such as Siri, Alexa, and other voice assistants, also require *speech recognition* capability, which is the ability to convert human speech to text that a computer can then analyze.

Data Mining, Text Mining The computerized process of extracting insights from vast collections of numerical or textual records.

Committing to Ethical and Legal Communication

5 LEARNING OBJECTIVE
Define *ethics*, explain the difference between an ethical dilemma and an ethical lapse, and list five guidelines for making ethical communication choices.

Ethics are the accepted principles of right and wrong that govern behavior and decision-making within a society.

Ethical communication includes all the information an audience needs to make an informed decision or take an informed stance on an issue.

Withholding information, distorting information, and plagiarizing are all forms of unethical communication.

Transparency is a sense of openness that gives audience members access to all the information they need to process messages accurately.

Ethics are the accepted principles of right and wrong that govern behavior and decision-making in a society. Ethical behavior is a companywide concern, but because communication efforts are the public face of a company, they are subjected to particularly rigorous scrutiny from regulators, legislators, investors, consumer groups, environmental groups, labor organizations, and other stakeholders. **Ethical communication** includes all the information an audience needs to make an informed decision or take an informed stance on an issue and is not deceptive in any way. Whenever you communicate in business, you ask audiences to trust that you will provide information that is complete and true. If you intentionally violate that trust, you have engaged in unethical communication.

FORMS OF UNETHICAL COMMUNICATION

Unethical communication can take several forms: withholding information, distorting information, and plagiarizing. Note that some of these choices can also be illegal in certain circumstances.

Withholding Information

First, senders can intentionally withhold information, such as avoiding taking responsibility for mistakes or presenting an incomplete set of facts when making a proposal. The widespread use of social media has increased the attention given to the issue of **transparency**, which in this context refers to a sense of openness, of giving all participants in a conversation access to the information they need to accurately process the messages they are receiving.

In addition to the information itself, audiences deserve to know when they are being marketed to and who is behind the messages they read or hear. Two important concerns in this regard are *native advertising* and *stealth marketing*. Native advertising, also known as *sponsored content*, is advertising material that is designed to look like regular news stories, articles, or social media posts. The U.S. Federal Trade Commission (FTC) requires companies to label such material as sponsored content if it is likely to mislead consumers into thinking it is "anything other than an ad."[22] Industry groups such as the Word of Mouth Marketing Association and the Interactive Advertising Bureau give their members specific guidelines to help prevent consumer confusion.[23]

Stealth marketing is the practice of promoting companies and products without making it clear to the audience that marketing activity is taking place. For example, "street team" marketing, in which team members promote goods and services to their friends and members of the public in exchange for prizes or other compensation, is unethical if team members don't disclose the fact that they are affiliated with a company and are being rewarded for their efforts. Such practices also violate FTC advertising guidelines.[24]

Distorting Information

Intentionally distorting information is also a form of unethical communication. This distortion can involve words, numbers, or images. For example, selectively misquoting someone in order to create a different impression than that person intended is unethical. Statistics and other numerical data can also be presented in ways that distort their implications. Two examples are using averages to conceal extreme individual values and manipulating trend calculations to suggest future values that the underlying data might not support. For example, you might boast that sales increased 40 percent in April as evidence of a big upward trend, when in fact March sales had been a disaster and all that 40 percent increase did was bring sales back to their earlier level. Images can be manipulated in unethical ways, such as altering photos or changing the scale of graphs and charts to exaggerate or conceal differences.

Distortion and outright fabrication of information are becoming greater concerns as the tools for manipulating sound, images, and video become more sophisticated. Convincingly "Photoshopping" images to fool audiences (using Adobe Photoshop or a similar program) has been possible for a while now, and the same potential for deception

is becoming possible for sound and video files—a phenomenon known as *deep fakes*. Business communicators must be more vigilant than ever as information consumers and more careful than ever as information creators.

Plagiarizing

Plagiarism is presenting someone else's words or other creative product as your own. Note that plagiarism can also be illegal if it violates a **copyright**, which is a form of legal protection for the originators of creative content. Copyright law covers a wide range of creative expression, including writing, visual design, computer programming, and sound and video recording.[25]

Plagiarism is presenting someone else's words or other creative product as your own.

Copyright is a form of legal protection for the originators of creative content.

Note that plagiarism standards and copyright law don't mean you can never use someone else's work. However, you must use it ethically and legally, including properly documenting your sources, clearly labeling anyone else's words and images as theirs, and using only minor portions, such as brief quotations. (Depending on the nature of the project and the material, you might need to get written permission to use material.) You can be sued for copyright infringement if you copy a significant part of a work, even if you don't copy it word for word or profit from doing so.[26]

The concept of *fair use* provides some flexibility in using others' creative work without violating copyright, particularly for noncommercial use, but there are no precise guidelines on how much you can use. And as attorney Kerry O'Shea Gorgone explains, fair use can only be invoked as a legal defense *after* a copyright owner sues you for infringement. You can't simply take someone else's content and preemptively label it as "fair use."[27] (*Content curation* and other forms of social media sharing present some particularly sticky issues; see page 229 for more.)

DISTINGUISHING ETHICAL DILEMMAS FROM ETHICAL LAPSES

Some ethical questions are easy to recognize and resolve, but others are not. Deciding what is ethical can be a considerable challenge in complex business situations. An **ethical dilemma** involves choosing among alternatives that aren't clear-cut. Perhaps two conflicting alternatives are both ethical and valid, or perhaps the alternatives lie somewhere in the gray area between clearly right and clearly wrong. Every company has responsibilities to multiple groups of people inside and outside the firm, and those groups often have competing interests. For instance, employees naturally want higher wages and more benefits, but investors who have risked their money in the company want management to keep costs low so that profits are strong enough to drive up the stock price. Both sides have a valid ethical position.

An *ethical dilemma* is a choice between alternatives that may all be ethical and valid to varying degrees.

In contrast, an **ethical lapse** is a clearly unethical choice. With both internal and external communication efforts, the pressure to produce results or justify decisions can make unethical communication a tempting choice. Telling a potential customer you can complete a project by a certain date when you know you can't is simply dishonest. There is no ethical dilemma here.

An *ethical lapse* is making a choice you know to be unethical.

Compare the messages in Figures 1.9 and 1.10 on the following pages for examples of how business messages can be unethically manipulated.

ENSURING ETHICAL COMMUNICATION

Employers have a responsibility to establish clear guidelines for ethical behavior, including ethical business communication. Many companies establish an explicit ethics policy by using a written **code of ethics** to help employees determine what is acceptable. A code is often part of a larger program of employee training and communication channels (such as *ethics hotline* phone numbers) that allow employees to ask questions and report instances of questionable ethics.[28]

A *code of ethics* is a document that outlines a company's ethics policies and establishes expectations for all employees.

In addition to setting clear ethical standards, managers must also demonstrate ethical behavior themselves and support employees who face ethical dilemmas. Codes and training don't mean much if employees feel pressured to make unethical choices or see their superiors acting unethically.

Whether or not a company has formal guidelines in place, every employee has a responsibility to communicate in an ethical manner. To make sure you are communicating ethically, keep these five questions in mind:

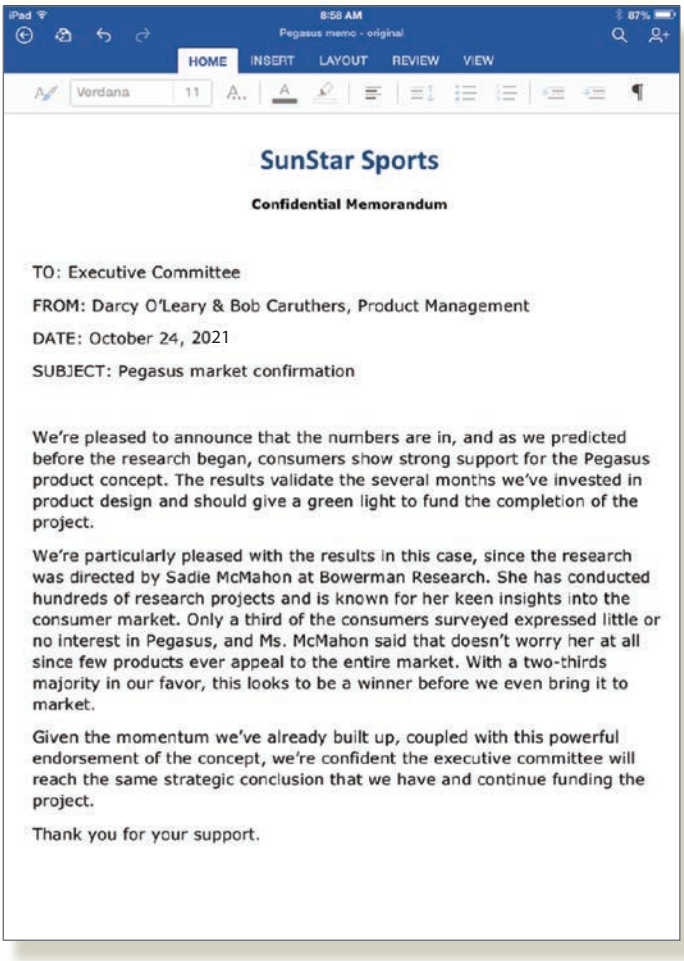
- Is my intention honorable, and does it demonstrate respect for my audience?

(a) The subject line is misleading. As you'll see, the research did *not* confirm the market potential for the new Pegasus product.

(c) The writers present McMahon's experience in a way that suggests it supports their claim, which isn't true. Plus, they don't provide any of McMahon's original text, so readers can't verify for themselves.

(e) This paragraph also mixes McMahon's opinions and conclusions with O'Leary and Caruthers's own opinions.

(g) The closing line assumes the writers have the committee's support, which may not be true.



SunStar Sports

Confidential Memorandum

TO: Executive Committee

FROM: Darcy O'Leary & Bob Caruthers, Product Management

DATE: October 24, 2021

SUBJECT: Pegasus market confirmation

We're pleased to announce that the numbers are in, and as we predicted before the research began, consumers show strong support for the Pegasus product concept. The results validate the several months we've invested in product design and should give a green light to fund the completion of the project.

We're particularly pleased with the results in this case, since the research was directed by Sadie McMahon at Bowerman Research. She has conducted hundreds of research projects and is known for her keen insights into the consumer market. Only a third of the consumers surveyed expressed little or no interest in Pegasus, and Ms. McMahon said that doesn't worry her at all since few products ever appeal to the entire market. With a two-thirds majority in our favor, this looks to be a winner before we even bring it to market.

Given the momentum we've already built up, coupled with this powerful endorsement of the concept, we're confident the executive committee will reach the same strategic conclusion that we have and continue funding the project.

Thank you for your support.

(b) The opening paragraph is dishonest, as you'll see in Figure 1.12. The phrase "as we predicted" also suggests that O'Leary and Caruthers had their minds made up before the research even started. Plus, the writers don't provide any background on the research or offer ways for readers to see the results for themselves.

(d) The statement that "a two-thirds majority" expressed interest in the product concept is not true, as you can see in Figure 1.10.

(f) The writers bias the conversation again by implying that the executive committee would be making a mistake if it disagreed with them.

Screenshot of Microsoft Outlook 2018, ©Microsoft Corporation

Figure 1.9 Unethical Communication
The writers of this memo clearly want the company to continue funding their pet project, even though the marketing research doesn't support such a decision. By comparing this memo with the version shown in Figure 1.10 (be sure to read the lettered annotations), you can see how the writers twisted the truth and omitted evidence in order to put a positive "spin" on the research.

To judge whether you are communicating ethically, ask yourself

- Am I being honorable?
- Am I giving people the information they need?
- Have I considered the effects of my message?
- Am I respecting the rights of others?
- Would a different approach be better?

- Am I giving my readers or listeners all the information they need to take an informed stance or make an informed decision?
- Have I considered the effect my message will have on the audience and anyone else who might be affected by it?
- Am I respecting the legal and moral rights of anyone whose information or ideas I am using?
- Could a different approach produce a more positive outcome for everyone involved?

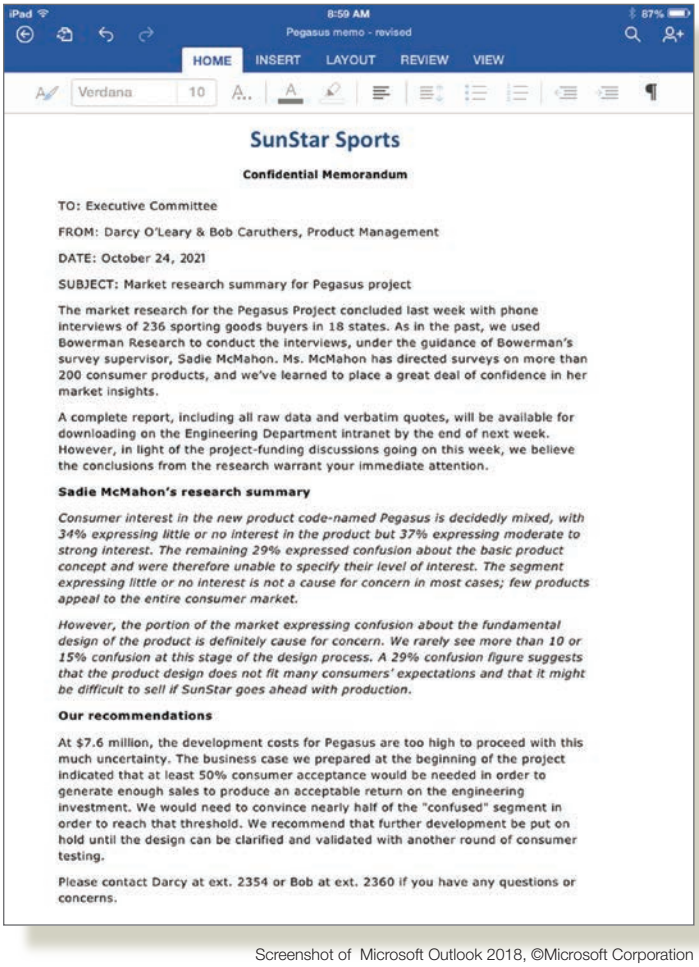
If you still can't decide whether a choice is ethical, picture yourself explaining your decision to someone whose opinion you value. Could you comfortably live with your choice?

ENSURING LEGAL COMMUNICATION

In addition to ethical guidelines, business communication is also bound by a wide variety of laws and regulations, including the following areas:

Business communication is governed by a wide variety of laws designed to ensure accurate, complete messages.

- **Promotional communication.** Anyone who creates marketing messages needs to be aware of the many laws that govern truth and accuracy in advertising. These laws address such issues as false and deceptive advertising, claims expressed on product packaging, the use of celebrity testimonials, and bait-and-switch tactics in which a store advertises a lower-priced product to lure consumers into a store but then tries to sell them a more expensive item.[29] Chapter 12 explores this area in more detail.
- **Contracts.** A **contract** is a legally binding promise between two parties in which one party makes a specified offer and the other party accepts.[30] Contracts cover a wide



Screenshot of Microsoft Outlook 2018, ©Microsoft Corporation

Figure 1.10 Ethical Communication
This version of the memo from Figure 1.9 presents the evidence in a more honest and ethical manner.

range of business scenarios, including employment, purchasing and leasing, project services, and nondisclosure agreements.

- **Employee communication.** A variety of local, state, and federal laws govern communication between employers and both potential and current employees. For example, employers are required to inform employees about workplace hazards, such as toxic chemicals.[31]
- **Intellectual property.** In an age when instant global connectivity makes copying and retransmitting electronic files effortless, the protection of digital and creative assets has become a widespread concern. **Intellectual property** (**IP**) includes copyrighted materials as well as *industrial property* such as patents, product designs, and logos.[32]
- **Financial reporting.** Finance and accounting professionals who work for publicly traded companies (those that sell stock to the public) must adhere to stringent reporting laws.
- **Defamation.** Negative comments about another party raise the possibility of **defamation**, the intentional public communication of false statements that damage character or reputation. Written defamation is called *libel*; spoken defamation is called *slander*.[33]
- **Transparency requirements.** Governments around the world are taking steps to help ensure that consumers and other parties know who is behind the information they receive, particularly when it appears online. In the United States, for example, the FTC requires influencers such as celebrities and professional athletes to disclose any relationships they have with companies when they promote or endorse products in social media.[34]

Intellectual property (IP) includes copyrighted materials and *industrial property* such as patents, product designs, and logos.

Defamation is the intentional public communication of false statements that damage character or reputation.

If you have any doubts about the legality of a message you intend to distribute, ask for advice from your company's legal department. A small dose of caution can prevent huge legal headaches and protect your company's reputation in the marketplace.

Developing Skills for Your Career

6 LEARNING OBJECTIVE
Identify six related skills that you will have the opportunity to develop as you work on your communication skills in this course.

As page 4 emphasizes, communication skills are the single most important asset you can polish as you launch and manage your career. In addition to helping you develop these skills, this course gives you the opportunity to enhance a wide range of other skills that experts say are vital for success in tomorrow's workplace:

- **Critical thinking.** In many of the assignments and activities, you will need to define and solve problems and make decisions or form judgments about a situation or set of circumstances.
- **Collaboration.** Depending on the configuration of your course, you will have various opportunities to work with classmates on reports, presentations, and other projects.
- **Knowledge application and analysis.** The ability to learn a concept and then apply that knowledge to other challenges is a skill that employers value highly.
- **Business ethics and social responsibility.** As you work on projects throughout this course, be mindful of the ethical implications that you could encounter in similar projects on the job.
- **Information technology skills.** Use projects and activities to build your skills with technology, including word-processing apps, spreadsheets, presentation software, messaging systems, and AI tools.
- **Data literacy.** You'll have multiple opportunities to fine-tune your *data literacy* skills, which include the ability to access, assess, interpret, manipulate, summarize, and communicate data.

COMMUNICATION CHALLENGES AT Affectiva

You have joined Affectiva as director of communications, with responsibility for internal and external communication programs. Use the insights you gained in this chapter to address these two challenges.

INDIVIDUAL CHALLENGE: Affectiva occasionally hosts seminars, online webinars, and other events at which potential customers can learn more about the company's solutions. One such event is designed to help market researchers understand how to use emotion analysis in their work. Assume this is the announcement for this event:[35]

> **Let's Get Emotional: How to Incorporate Facial Responses in Your Market Research Methodology**
>
> Surveys aren't the industry standard anymore: in fact, relying on this data alone doesn't stand up to what's coming next. Imagine the future of market research where respondents no longer have to manually input their thoughts and reactions to content, but you will be able to tell right from the expressions on their faces. Join us on September 24 for a free 1-hour webinar and live Q&A to learn more.
>
> Source: Let's Get Emotional-How to Incorporate Facial Responses in Your Market Research Methodology,© 2018 Affectiva

Summarize this announcement in a single tweet, with a maximum length of 200 characters, including spaces. (The original is 401, so you need to compress it by half.) A URL will be included in the tweet, but don't worry about it for this assignment.

TEAM CHALLENGE: The science behind Affectiva's AI tools is beyond the grasp of many of its customers in the business arena. The company does an excellent job of translating the science into audience-friendly language that business professionals can appreciate, but lately you've noticed that one of the company's scientists tends to slip into some heavy math and science during customer presentations and media events. When you mention it during a casual conversation, he explains that he is trying to emphasize the superiority of Affectiva's solutions, and it's up to users to get better educated about the tools they use.

Assume that you and your team have brainstormed four responses to the situation. Discuss these alternatives and choose the best response, and then draft a post for your class blog explaining why you chose that option:

1. To avoid the impression that you are picking on this one individual, issue new companywide guidelines for audience-friendly communication. Emphasize the importance of speaking and writing to customers in language they understand.
2. Have a friendly discussion with him about the nature of Affectiva's business and point out that customers are all specialists in other areas and can't be expected to become specialists in AI. Use an analogy such as cars or mobile phones, where users don't need to know how these systems work in order to use them successfully. Emphasize that Affectiva's sales will suffer if using the products seems to require too much learning time.
3. Make sure this scientist is always accompanied by a skilled communication specialist who can serve as a technical translator for customers and the media.
4. Take his advice and launch a new customer education program to help all users understand deep learning, facial mapping, voice analysis, and other key techniques.

Key Terms

audience-centered approach Understanding and respecting the members of your audience and making every effort to get your message across in a way that is meaningful to them
code of ethics A written set of ethical guidelines that companies expect their employees to follow
communication The process of transferring information, meaning, and understanding between senders and receivers
communication barriers Forces or events that can disrupt communication, including noise and distractions, competing messages, filters, and channel breakdowns
communication channels Systems used to deliver messages
communication medium The form in which a message is presented; can be oral (spoken), written, or visual
contract A legally binding promise between two parties, in which one party makes a specified offer and the other party accepts
copyright A form of legal protection for the expression of creative ideas
critical thinking The ability to evaluate evidence completely and objectively in order to form logical conclusions and make sound recommendations
decoding Extracting the idea from a message
defamation The intentional public communication of false statements that damage character or reputation
encoding Putting an idea into a message (words, images, or a combination of both)
ethical communication Communication that includes all the information an audience needs to make an informed decision or take an informed stance on an issue and is not deceptive in any way
ethical dilemma A situation that involves making a choice when competing alternatives are ethically valid or the alternatives aren't completely wrong or completely right
ethical lapse A clearly unethical choice
ethics The accepted principles of right and wrong that govern behavior and decision-making in a society
feedback Information from receivers regarding the quality and effectiveness of a message
formal communication network Communication channels that flow along the lines of command in an organization
informal communication network All communication that takes place outside the formal communication network
information overload Condition in which people receive more information than they can effectively process
intellectual property (**IP**) Creative assets, including copyrighted materials, as well as industrial property, such as patents, product designs, and logos
intelligent communication technology (**ICT**) Systems that use artificial intelligence to enhance the communication experience
message The "container" for an idea to be transmitted from a sender to a receiver
plagiarism Presenting someone else's words or other creative product as your own
professionalism The quality of performing at a high level and conducting oneself with purpose and pride
selective attention Focusing on a subset of the incoming stimuli or information sources and ignoring others
social communication model An interactive, conversational approach to communication in which audience members are empowered to participate fully
social media Digital platforms that empower stakeholders as participants in the communication process by allowing them to share content, revise content, respond to content, or contribute new content
stakeholders Groups affected by a company's actions, including customers, employees, shareholders, suppliers, neighbors, and local communities
transparency A sense of openness that gives all participants in a conversation access to the information they need to accurately process the messages they are receiving
"you" attitude Communicating with an audience-centered approach; creating messages that are about "you," the receiver, rather than "me," the sender

Summary of Learning Objectives

1 Explain the importance of effective communication to your career and to the companies where you will work. Effective communication is important to your career because no matter what line of work you pursue, you need to be able to share information with other people. You can have the greatest business ideas in the world, but they're no good to anyone if you can't express them clearly and persuasively. In addition to benefiting you personally, your communication skills will help your company in three areas:

- *Operations*—every company needs fast, effective communication between managers and staff, within departments, between departments, and between the company and its external business partners.
- *Intelligence*—companies need to keep a constant "ear to the ground" to be alerted to new opportunities, risks, and impending problems.
- *Relationships*—effective communication strengthens the connections between a company and all its stakeholders.

2 Explain what it means to communicate as a professional in a business context. Communicating as a professional starts with being a professional, which embodies striving to excel, being dependable and accountable, being a team player, demonstrating a sense of etiquette, making ethical decisions, and maintaining a positive outlook. As a professional, you will be expected to bring a wide range of communication skills:

- Acquiring, processing, and sharing information, including demonstrating digital information fluency and critical thinking
- Using communication to foster positive working relationships, including practicing good etiquette, resolving conflicts respectfully, and communicating with people from diverse backgrounds
- Representing your employer in the public arena, which includes acting professionally on social media and in other venues and following accepted standards of grammar, spelling, and other aspects of quality writing and speaking
- Efficiently using the communication tools and systems that your employer provides

3 Contrast the conventional communication process model with the social communication model. The conventional model involves eight steps: (1) the sender starts with an idea to share; (2) the sender encodes the meaning of that idea as a message; (3) the sender produces the message in a transmittable medium; (4) the sender transmits the message through a channel; (5) the audience receives the message; (6) the audience decodes the message to extract its meaning; (7) the audience responds to the message; and (8) the audience may provide feedback to the sender.

In contrast to this conventional model, in which receivers are often in a passive role, the social communication model uses social media tools to create an interactive and participative environment in which all parties have a chance to join the conversation.

4 Identify five major benefits of business communication technology and three major innovations that are reshaping the practice of communication. The potential benefits of communication technology include (1) making communication more effective, (2) making communication more efficient, (3) improving research, (4) assisting communicators with decision-making, and (5) removing communication barriers.

Three innovations that are reshaping business communication are social and workgroup communication systems, mobile communication, and intelligent communication technologies.

5 Define ethics, explain the difference between an ethical dilemma and an ethical lapse, and list five guidelines for making ethical communication choices. Ethics are the accepted principles of right and wrong that govern behavior and decision-making in a society. Ethical communication is particularly important in business because communication is the public face of a company, which is why communication efforts are intensely scrutinized by company stakeholders. The difference between an ethical dilemma and an ethical lapse is a question of clarity. An ethical dilemma occurs when the choice is unclear because two or more alternatives seem equally right or equally wrong. In contrast, an ethical lapse occurs when a person makes a conscious choice that is clearly unethical.

To make ethical choices in any situation, ask yourself these five questions: (1) Is my intention honorable, and does it demonstrate respect for my audience? (2) Am I giving my readers or listeners all the information they need to take an informed stance or make an informed decision? (3) Have I considered the effect my message will have on the audience and anyone else who might be affected by it? (4) Am I respecting the legal and moral rights of anyone whose information or ideas I am using? (5) Could a different approach produce a more positive outcome for everyone involved?

6 Identify six related skills that you will have the opportunity to develop as you work on your communication skills in this course. The six related skills are critical thinking, collaboration, knowledge application and analysis, business ethics and social responsibility, information technology skills, and data literacy.

Test Your Knowledge

To review chapter content related to each question, refer to the indicated Learning Objective.

1-1. What are the three essential areas in which communication can benefit an organization? [LO-1]
1-2. What are the five attributes of effective business communication? [LO-1]
1-3. What are the six traits of professionalism? [LO-2]
1-4. Why should communicators take an audience-centered approach to communication? [LO-2]
1-5. What steps must occur before an audience member perceives the presence of an incoming message? [LO-3]
1-6. What are the most common barriers to successful communication? [LO-3]
1-7. How does the social communication model differ from traditional business communication practices? [LO-3]
1-8. What are the five key benefits of business communication technology? [LO-4]
1-9. What is an ethical dilemma? [LO-5]
1-10. What is an ethical lapse? [LO-5]

Apply Your Knowledge

To review chapter content related to each question, refer to the indicated Learning Objective.

1-11. Why is communication sometimes considered a negotiation of meaning rather than a transfer of meaning? [LO-1]
1-12. Should managers try to shut down the informal communication network if they discover that employees are spreading negative gossip or false rumors? Why or why not? [LO-2]
1-13. What general steps could you take to help ensure that high schoolers and their parents will respond positively to your messages promoting your new tutoring service? [LO-3]
1-14. Why are businesses investing in AI-driven communication tools? [LO-4]
1-15. You're the CEO of a company whose sales are declining, and there is a 50/50 chance you will need to lay off some of your employees sometime in the next two to three months. You must decide whether to tell them now so they can look for new jobs as soon as possible, even though you're not yet sure layoffs will be necessary, or wait until you are sure layoffs will occur. Explain why this is an ethical dilemma. Be sure to consider the effect a sudden exodus of valuable employees could have on the company's prospects. [LO-5]

Practice Your Skills

Message for Analysis

1-16. Analyzing Communication Effectiveness [LO-1] Read the following blog post, and then (a) analyze whether the message is effective or ineffective (be sure to explain why), and (b) revise the message so that it follows this chapter's guidelines.

It has come to my attention that many of you are lying on your time cards. If you come in late, you should not put 8:00 on your card. If you take a long lunch, you should not put 1:00 on your time card. I will not stand for this type of cheating. I simply have no choice but to institute an employee monitoring system. Beginning next Monday, video cameras will be installed at all entrances to the building, and your entry and exit times will be logged each time you use electronic key cards to enter or leave.

Anyone who is late for work or late coming back from lunch more than three times will have to answer to me. I don't care if you had to take a nap or if you girls had to shop. This is a place of business, and we do not want to be taken advantage of by slackers who are cheaters to boot.

It is too bad that a few bad apples always have to spoil things for everyone.

Exercises

Each activity is labeled according to the primary skill or skills you will need to use. To review relevant chapter content, you can refer to the indicated Learning Objective. In some instances, supporting information will be found in another chapter, as indicated.

1-17. Writing: Compositional Modes: Summaries [LO-1] Write a paragraph introducing yourself to your instructor and your class. Address such areas as your background, interests, achievements, and goals. Submit your paragraph using email, blog, or social network, as indicated by your instructor.

1-18. Media Skills: Microblogging [LO-1], Chapter 12 Write four tweets to persuade other college students to take the business communication course. Think of the first message as the "headline" of an advertisement that makes a bold promise regarding the value this course offers every aspiring business professional. The next three messages should be support points that provide evidence to back up the promise made in the first message.[36] Although Twitter allows messages up to 280 characters, keep your tweets as brief as possible.

1-19. Fundamentals: Analyzing Communication Effectiveness [LO-1] Identify a video clip (on YouTube or another online source) that you believe represents an example of effective communication. It can be in any context, business or otherwise, but make sure it is something appropriate to discuss in class. Post a link to the video on your class blog, along with a brief written summary of why you think this example shows effective communication in action.

1-20. Planning: Assessing Audience Needs [LO-2], Chapter 4 Choose a business career that sounds interesting to you, and imagine that you are getting ready to apply for jobs in that field. Identify three personal or professional qualities you have that would be important for someone in this career field. Write a brief statement (one or two sentences) regarding each quality, describing in audience-focused terms how you can contribute to a company in this respect. Submit your statements via email or class blog.

1-21. Communication Etiquette: Communicating with Sensitivity and Tact [LO-2] Potential customers frequently visit your production facility before making purchase decisions. You and the people who report to you in the sales department have received extensive training in etiquette issues because you deal with high-profile clients so often. However, the rest of the workforce has not received such training, and you worry that someone might inadvertently say or do something that would offend one of these potential customers. In a two-paragraph email, explain to the general manager why you think anyone who might come in contact with customers should receive basic etiquette training.

1-22. Collaboration: Team Projects; Planning: Assessing Audience Needs [LO-2], Chapter 2, Chapter 4 Your boss has asked you to research and report on corporate child-care facilities. Working with two team members assigned by your instructor, identify four or five things you'll want to know about the situation and about your audience before starting your research. Briefly explain why each of the items on your list is important.

1-23. Planning: Constructing a Persuasive Argument [LO-2], Chapter 12 Blogging is a popular way for employees to communicate with customers and other parties outside the company. Employees' own blogs can help companies and their customers by providing helpful information and "putting a human face" on the company. However, in some instances employees have been fired for posting information that their employers said was inappropriate. One area of concern is criticism of the company or individual managers. Should employees be allowed to criticize their employers in a public forum such as a blog? In a brief email message, argue for or against company policies that prohibit critical information in employee blogs.

1-24. Fundamentals: Analyzing Communication Effectiveness [LO-3] Use the eight phases of the communication process to analyze a miscommunication you've recently had with a coworker, supervisor, classmate, teacher, friend, or family member. What idea were you trying to share? How did you encode and transmit it? Did the receiver get the message? Did the receiver correctly decode the message? How do you know? Based on your analysis, identify and explain the barriers that prevented successful communication in this instance.

1-25. Writing: Compositional Modes: Persuasion [LO-3], Chapter 12 Social media use varies widely from company to company. Some firms enthusiastically embrace these tools and approaches. Others have taken a more cautious approach, either delaying the adoption of social media or restricting their use. You work for an "old school" manufacturing firm that prohibits employees from using social media during work hours. Company management believes that social media offer little business value and distract employees from their duties. In a brief email message to your boss, identify the ways that social media are changing the communication process and relationships between companies and their employees, customers, and communities. Provide at least one example.

1-26. **Fundamentals: Analyzing Communication Effectiveness** [LO-4] Using a mobile device, visit the websites of three companies that make products or provide services you buy or might buy in the future. Which of the websites is the most user-friendly? How does it differ from the other sites? Do any of the companies offer a mobile shopping app for your device?

1-27. **Technology: Using Communication Tools** [LO-4] Find a free online communication service (such as a blogging platform) that you have no experience using as a content creator or contributor. Perform a basic task such as opening an account or setting up a blog. Was the task easy to perform? Were the instructions clear? Could you find help online if you needed it? Is there anything about the experience that could be improved? Summarize your conclusions in a brief email message to your instructor.

1-28. **Technology: Using Communication Tools** [LO-4] Try two or three of the free emotion-recognition AI tools at www.affectiva.com/experience-it. In a post for your class blog, summarize your experience as an end user and offer your thoughts on the business value of this technology.

1-29. **Communication Ethics: Distinguishing Ethical Dilemmas and Ethical Lapses** [LO-5] Knowing that you have numerous friends throughout the company, your boss relies on you for feedback concerning employee morale and other issues affecting the staff. She recently asked you to start reporting any behavior that might violate company policies, from taking office supplies home to making personal calls on company time. List the issues you'd like to discuss with her before you respond to her request.

1-30. **Communication Ethics: Distinguishing Ethical Dilemmas and Ethical Lapses** [LO-5] Briefly explain why you think each of the following is or is not ethical.
   a. Keeping quiet about a possible environmental hazard you've just discovered in your company's processing plant
   b. Overselling the benefits of workgroup messaging to your company's managers; they never seem to understand the benefits of technology, so you believe that a bit of hype is the only way to convince them to make the right choice
   c. Telling an associate with whom you are close friends that she needs to pay more attention to her work responsibilities or management will fire her
   d. Recommending the purchase of equipment your department doesn't really need in order to use up your allocated funds before the end of the fiscal year; this will help ensure that your budget won't be cut next year, when you might have a real need for the money

1-31. **Communication Ethics: Providing Ethical Leadership** [LO-5] Cisco, a leading manufacturer of equipment for the internet and corporate networks, has a code of ethics that it expects employees to abide by. Visit the company's website at www.cisco.com and find its *Code of Business Conduct*. In a brief paragraph, describe three specific examples of things employees could do that would violate these provisions.

Expand Your Skills

Critique the Professionals

Locate an example of professional communication from a reputable online source. It can reflect any aspect of business communication, from an advertisement or a press release to a company blog or website. Evaluate this communication effort in light of any aspect of this chapter that is relevant to the sample and interesting to you. For example, is the piece effective? Audience-centered? Ethical? Using whatever medium your instructor requests, write a brief analysis of the piece (no more than one page), citing specific elements from the piece and support from the chapter.

Sharpening Your Career Skills Online

Find an online video, a presentation, a website, or an article that describes the use of any intelligent communication technology in business. Write a brief email message to your instructor or a post for your class blog, describing the item that you found and summarizing the advice it offers.

Build Your Career

Take the 20-question self-assessment in Table 2 on page xxxv in the Prologue. Are you able to answer most of the questions with confidence, or are you unsure about some of these factors? For the items you are unsure about, what steps can you take to get more clarity before you begin your job search? Has this self-assessment changed your thoughts on the type of career and employment path you would like to pursue? Keep your answers handy as you move through the job search process, and use them to evaluate job offers to see how well they align with how you would like to spend your working years.

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2 Collaboration, Interpersonal Communication, and Business Etiquette

LEARNING OBJECTIVES

After studying this chapter, you will be able to

1. Describe the characteristics of effective teams, outline five steps for resolving team conflict, and offer advice on working in virtual teams.
2. Offer guidelines for collaborative communication, explain what it means to give constructive feedback, and identify major collaboration technologies.
3. List the key steps needed to ensure productive meetings.
4. Explain why listening is such a complex communication process, and describe three steps to becoming a better listener.
5. Explain the importance of nonverbal communication, and identify six major categories of nonverbal expression.
6. Explain the importance of business etiquette, and identify five key areas in which good etiquette is essential.

COMMUNICATION CLOSE-UP AT Salesforce

www.salesforce.com

As people rise up the corporate ladder and become leaders in their industries, one might assume they naturally take on the role of wise elders and begin to listen less and talk more. But Salesforce founder and CEO Marc Benioff would tell you just the opposite, that listening is even more crucial as one gets farther away from the front lines. Listening has always been vital to Benioff's management style, and he's not stopping now, even as the leader of an $8 billion corporation.

In fact, the very founding of Salesforce and the business revolution it helped usher in were the direct result of his penchant for listening. Benioff spent a lot of time listening in the early days of the World Wide Web, as Amazon was expanding its online shopping services and beginning to shake the foundations of the entire retailing sector. What he heard prompted him to wonder why the software industry didn't work like Amazon. Specifically, why wasn't *enterprise software*, the vast platforms that are the central nervous systems of modern corporations, sold as an online service rather than as a product that customers had to install and continually update?

Motivated by that question, Benioff founded Salesforce to offer customer relationship management (CRM) software that companies can subscribe to as a service, becoming an early force in what is now known as software as a service (SaaS). His vision was to make CRM as easy to use as shopping on Amazon, and he was obviously onto something: Today more than 150,000 companies use Salesforce's on-demand software.



Variety/Shutterstock

Salesforce.com founder and CEO Marc Benioff has made listening a fundamental aspect of his leadership style.

Even with this success, the obsession with listening lives on. Benioff and his top executives frequently go on worldwide "listening tours" to pick up any marketplace signals that might suggest threats or opportunities. He likes to cultivate a "beginner's mind," enabling him to put aside everything he thinks he knows about a subject and listen with an open, uncluttered mind.

The company is just as eager to listen inside its own walls. In a nod to the Festivus holiday from the TV show

Seinfeld, it hosts a chat group called Airing of Grievances, where senior managers can hear what employees have to say. To replace the often-dreaded annual performance review, the firm also created the Feedback App with a real-time channel that employees can use to give and receive feedback, making sure that concerns are heard and accomplishments are celebrated. As a result of this attention to employees, Salesforce consistently ranks as one of the best companies to work for in the United States.

The driving spirit behind all this success can be found in a simple statement from Benioff: "I love listening."[1]

Communicating Effectively in Teams

1 LEARNING OBJECTIVE
Describe the characteristics of effective teams, outline five steps for resolving team conflict, and offer advice on working in virtual teams.

Salesforce's Marc Benioff (profiled in the chapter-opening Communication Close-Up) knows how essential listening is to every aspect of running a business. Listening is one of the interpersonal skills you will explore in this chapter, which starts with a look at communicating in teams.

Collaboration—working together to meet complex challenges—is a prime skill expected in a wide range of professions. No matter what career path you pursue, it's a virtual guarantee that you will need to collaborate in at least some of your work activities, and your communication skills will pay off handsomely in these interactions.

Collaboration, working together to solve complex problems, is an essential skill for workers in nearly every profession.

TYPES OF TEAMS

A **team** is a unit of two or more people who work toward a shared goal and, unlike other work groups, depend on one another to achieve that goal.[2] Teams are often at the core of **participative management**, the effort to involve employees in the company's decision-making.

A *team* is a unit of two or more people who work toward a shared goal and, unlike other work groups, depend on one another to achieve that goal.

Participative management is the effort to involve employees in the company's decision-making.

Companies use a variety of team formats and sizes, with different degrees of structure and formality (see Table 2.1). The simplest team consists of two people assigned to collaborate on a task, with no more formality than the mandate to get the job done. At the other extreme, a team could have a hundred or more members and a formal management structure. Some teams have appointed leaders or managers, whereas others are self-managed.

A **cross-functional team** is one that includes people from more than one department or functional area within the company. Cross-functional teams are a powerful model for assembling talent because they can overcome the fixed organizational structure and unite people with different areas of expertise and responsibility. By helping to overcome the *silo effect*, where people within each functional area tend to view and perform their work within their own "silos," such teams can also serve as a vital communication network. For all their benefits, however, cross-functional teams must coordinate the work of people with different priorities and who formally report to managers in different parts of the company. Such teams are more vulnerable to internal conflict and competition than single-function teams and need strong leadership to be successful.[3]

A *cross-functional team* combines the efforts of people from multiple departments or functional areas across the company.

TABLE 2.1 Common Types of Business Teams

Type	Characteristics
Committee	A permanent team established to address recurring issues, such as corporate governance or workplace safety
Problem-solving	Team assembled to analyze a problem or issue, recommend a solution and, in some cases, implement the solution; sometimes referred to as a *task force*
Project	Team assembled to complete a specific project, such as a new product launch or installation of a new computer system
Creative	Similar to project teams but used in fields such as advertising and web design; combines the efforts of various creative professionals and may work on a series of projects together
Cross-functional	Pulls together people from across multiple departments or functional areas; the best way to tackle companywide issues or opportunities but can be challenging to manage

ADVANTAGES AND DISADVANTAGES OF TEAMS

Teams can provide businesses and individuals with a variety of benefits:[4]

The advantages of successful teamwork include pooling knowledge, taking advantage of diverse viewpoints, and increasing acceptance of solutions the team proposes.

- **More information and knowledge.** By pooling the experience of multiple individuals, a team has access to more information and experience.
- **Learning opportunities.** Teams that bring together people with various work specialties give members the chance to learn from each other.
- **Boldness.** People who might hesitate to take calculated risks on their own can be more willing to make bold moves as part of the team.
- **Accountability.** Participating in teams creates a built-in sense of accountability to others.
- **Trust building.** Working closely in teams helps people develop trust in their colleagues.
- **A broader range of viewpoints.** Diverse teams can bring a variety of perspectives that improve decision-making.
- **Buy-in for solutions the team creates.** Those who participate in making a decision are more likely to support it and encourage others to accept it.
- **Improved performance.** Effective teams can be better than top-performing individuals at solving complex problems.
- **A sense of community in good times and bad.** Being on a team helps individuals share in the celebration of successes and provides emotional support during challenging periods.

Although teamwork has many advantages, teams need to be aware of and work to counter the following potential disadvantages:

Teams need to avoid the negative impact of groupthink, hidden agendas, excessive costs, and employee overload.

- **Groupthink.** Like other social structures, business teams can generate tremendous pressure to conform. **Groupthink** occurs when peer pressure causes individual team members to withhold contrary opinions and to go along with decisions they don't really believe in. The consequences of groupthink can range from bland, unimaginative work to outright disasters.
- **Hidden agendas.** Some team members may have a **hidden agenda**—private, counterproductive motives, such as a desire to take control of the group, to undermine someone else on the team, or to pursue an incompatible goal.
- **Cost.** Aligning schedules, arranging meetings, and coordinating individual parts of a project can eat up a lot of time and money.
- **Overload.** Some companies have embraced collaborative work approaches to such an extent that they are overloading employees with team assignments.[5]

ETHICS DETECTIVE

Solving the Case of the Missing Team

When the company president assembled the team to find creative solutions to the company's cash flow problems, few people thought it would succeed. Through plenty of hard work, however, you and your colleagues have found new sources of investment capital. Now it's time to present your accomplishments to the board of directors, and your entire team has been looking forward to this meeting for weeks. Because appearing in front of the board can be a major career boost, the team planned to present the results together, giving each person a few minutes in the limelight.

However, Jackson Wallace, the chief financial officer and leader of your team, had a surprise for you this morning. He'd received word at the last minute that the board wanted a short, concise presentation, and he said the best way to comply was with a single presenter. No one was happy about the change, but Wallace is the highest-ranking employee on the team and the only one with experience presenting to the board.

Disappointment turned to dismay as you and your teammates watched from the back of the conference room. Wallace deftly compressed your 60-minute presentation down to 20 minutes, and the board showered him with praise. Unfortunately, he never introduced any of the other team members, so your potential moment in the sun passed without recognition.

ANALYSIS

1. Did Wallace behave unethically by not introducing you and your colleagues to the board? Explain your answer.
2. Later, you complain to a colleague that by stressing "my team" so often, Wallace made the presentation all about him, not the team. But one of your colleagues argues that the team's assignment was to solve the problem, not to score career points with the board, so that goal shouldn't have been such a top priority. Explain why you agree or disagree.

CHARACTERISTICS OF EFFECTIVE TEAMS

The characteristics of effective teams include a shared purpose, a belief in the team's efforts, positive behavioral norms, and open and honest communication.

A wide variety of factors can account for team success:[6]

- A shared sense of purpose and compatible values
- A clear and challenging goal
- A belief in the value of the team's efforts
- A well-balanced mix of people who can provide the insights and skills needed to achieve the goal
- A size that aligns well with the team's responsibilities
- An environment of *psychological safety*, encouraging people to share information, propose unproven ideas, and express vulnerability without fear of repercussion
- A willingness to put the team's needs ahead of individual needs
- Open and honest communication

Notice how all these traits rely on communication, both in the information that is shared and in the way people interact with one another.

GROUP DYNAMICS

Group dynamics are the interactions and processes that take place in a team.

Norms are informal standards of conduct that members share and that guide member behavior.

The interactions and processes that take place among the members of a team are called **group dynamics**. Productive teams tend to develop clear **norms**, informal standards of conduct that members share and that guide member behavior. Group dynamics and norms are influenced by the roles team members assume and how the team evolves as it gets up to speed.

Team Roles

Team-maintenance roles focus on the interpersonal and social aspects of being on a team.

Task-oriented roles focus on work quality and productivity.

In addition to whatever functional skills they bring, members of a team can play a variety of helpful roles to ensure harmonious, productive work. **Team-maintenance roles** focus on the interpersonal and social aspects of being on a team, such as enforcing team norms, ensuring that everyone's voice is heard, encouraging participation, compromising, and mediating disputes.[7]

Task-oriented roles focus on work quality and productivity, getting the team's work done on time and on budget. They can include providing technical expertise, suggesting new ideas, integrating diverse ideas, exploring options, and keeping the team on schedule.[8]

As you can imagine, a team needs a healthy balance of both types of roles to be harmonious and successful. Of course, many people will take on more than one role, and someone may step into a role temporarily, such as mediating in a disagreement. Whenever you are working on a team, keep an eye out for ways you can help with any role, even if you aren't in a leadership position.

Stages of Team Development

The Tuckman model of group development usually includes five phases:
- Forming
- Storming
- Norming
- Performing
- Adjourning

Teams typically evolve through several phases on their way to becoming productive. Figure 2.1 shows the popular model proposed by Dr. Bruce Tuckman, which identifies four or five phases a new team goes through as it evolves:[9]

- **Forming.** The group comes together, and various members begin to establish themselves in specific roles. In some cases, one person is given the formal role of team leader, but in others an informal leader may emerge as the members establish their roles. If the group's goal hasn't already been defined, the team leader or the team members themselves will establish it.
- **Storming.** As team members begin to discuss their positions and become more assertive in establishing their roles, disagreements and uncertainties may arise. Much of the conflict may be constructive as team members share ideas for meeting the team's goals. However, if conflict threatens to get destructive, active conflict resolution might be necessary (see the next section). Everyone has responsibility for helping the team get through this turbulent phase as quickly as possible. Positive steps include appreciating the benefit of having diverse viewpoints, assuming that people are there to do good work, and giving everyone the opportunity to be heard.[10]

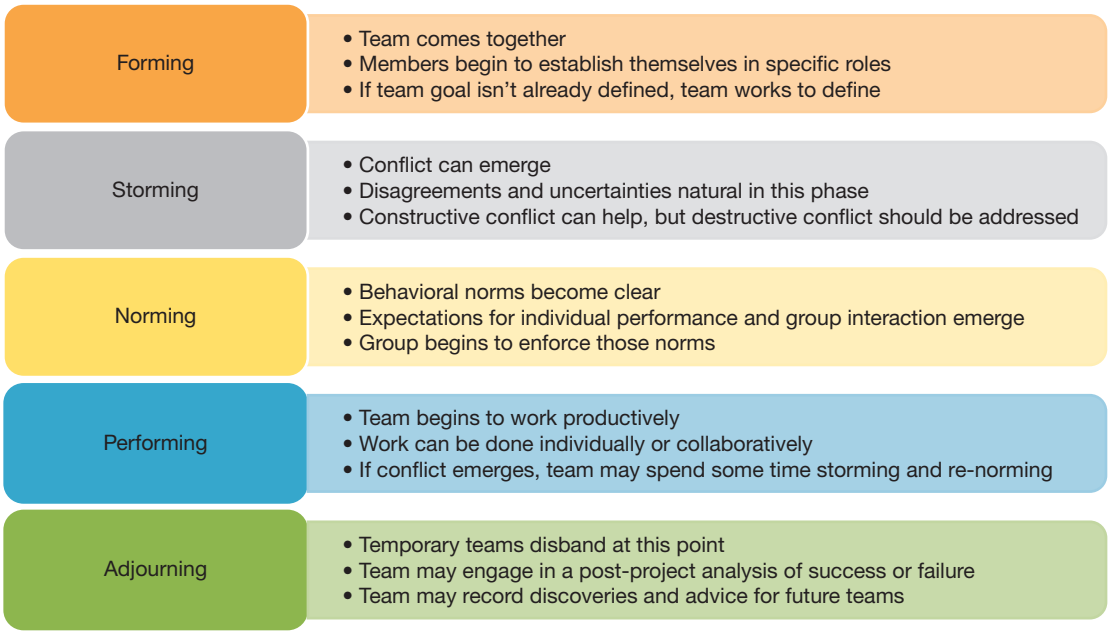


Figure 2.1 Phases of Team Development
Groups generally progress through several stages on their way to becoming productive and reaching their objectives.
Sources: Stephen P. Robbins and Mary Coulter, *Management*, 14th ed. (New York: Prentice Hall, 2018), 418–419; Denise Bonebright, "40 Years of Storming: A Historical Review of Tuckman's Model of Small Group Development," *Human Resource Development International* 29, 13, no. 1 (February 2010): 111–120.

- **Norming.** As conflicts are resolved, the team begins to take on a cohesive personality with clear behavioral norms, such as expectations of civil behavior and mutual dependability.
- **Performing.** With a cohesive, distinct personality and norms to guide behavior, the group is ready to perform its task. As the work progresses, new questions and conflicts may emerge, requiring the team to spend some time storming and re-norming again.
- **Adjourning.** When temporary teams accomplish their goal, the fifth and final step is to adjourn, or disband, the team. This phase may involve some post-project analysis in which members assess how well the team performed and compile advice for future teams.

Resolving Conflict in Teams

Even in the best of circumstances, people will occasionally disagree or rub each other the wrong way. And in dysfunctional environments with ineffective management, conflict can overwhelm normal business activities. Conflict can be a particular issue in team situations, where people are expected to prioritize team goals over their own individual interests. Conflict can arise for a variety of reasons, from competition for resources to disagreements over goals or work methods to personality differences.

Conflict in teams can be either constructive or destructive.

Constructive Versus Destructive Conflict Although the term *conflict* sounds negative, conflict isn't necessarily bad. It can be *constructive* if it forces important issues into the open, increases the involvement of team members, and generates creative ideas for solving a problem. Teamwork isn't always about happiness and harmony; even teams that have some interpersonal friction can excel with effective leadership and team players who are committed to strong results. As the teamwork experts Andy Boynton and Bill Fischer put it, "Virtuoso teams are not about getting polite results."[11]

In contrast, conflict is *destructive* if it diverts energy from more important issues, destroys the morale of teams or individual team members, or polarizes or divides the team.[12] Destructive conflict can lead to *win-lose* or *lose-lose* outcomes, in which one or both sides lose, to the detriment of the entire team. If you approach conflict with the idea that both sides can satisfy their goals to at least some extent (a *win-win* strategy), you can minimize losses for everyone.

Steps to Resolve Team Conflict When you encounter conflict in a team setting, follow these five steps to resolve it in a positive and constructive way:

- **Decide if the conflict is worth addressing.** Resolving conflict takes time and energy and can temporarily disrupt activities and relationships. If the conflict is minor or will disappear on its own (such as when a temporary team disbands), it might make more sense to live with it.

As you move ahead with conflict resolution, start by examining your own potential contribution to the difficulties.

- **Examine your own beliefs and behaviors.** If you are involved in a conflict that you want to resolve, examine your own stance before taking any action. You might be contributing to the conflict in ways you hadn't considered.
- **Identify where the conflict truly originates.** As you have probably experienced in your personal life, conflicts aren't always about what they *appear* to be about; the real difference may lie below the surface. For example, two team members might be arguing about work methods when their real conflict is deeper. They could have different cultural priorities, for instance, such as the importance of group harmony versus individual career success.
- **Establish common ground.** Figure out what everyone does agree on, and then use that foundation to build a solution. For example, if people disagree about the team's goals, dig deeper and find out if they agree about the company's overall goals and strategies. If they agree at that level, you can use that to launch a discussion about how to shape team goals that support the company's goals.

You have four choices for resolving conflict: avoidance, accommodation, compromise, or collaboration.

- **Choose a strategy for resolving the differences.** You have four basic choices here. (1) You can *avoid* the circumstances that create conflict, such as not assigning people who don't get along to the same tasks. Avoidance doesn't solve the underlying conflict, of course, but it can be the most efficient solution in some cases. (2) One side can choose to *accommodate* or sacrifice for the good of the organization or to maintain harmony in a relationship.[13] If two people disagree about the best way to approach a project, one might decide to accept and support the other's approach. (3) The two sides can choose to *compromise*, with both sides giving up something. Balanced compromise is one of the hallmarks of successful teams.[14] (4) Both sides can choose to *collaborate* on a new solution that satisfies everyone's needs and expectations—a win-win strategy. Collaboration in this sense can be a rewarding experience because it makes conditions better for everyone and gives a team or group the satisfaction of a shared accomplishment.

Whichever approach you take, practice and encourage respectful, calm communication. Everyone should choose their words and nonverbal gestures carefully to maintain focus on the problem at hand and to avoid further inflaming an already uncomfortable situation.[15] Use *active listening* (see page 56) to better understand what other people have to say.

In any conflict situation, use active listening to understand the other party's position.

VIRTUAL TEAMS

A *virtual team* is one in which members work in at least two different locations and rely on technology to communicate and collaborate.

A **virtual team** is one in which members work in at least two different locations and rely on technology to communicate and collaborate. Professionals in a wide variety of situations work in virtual teams, including telecommuting (working from home or other off-site locations), collaborating with colleagues in other offices, and working as independent contractors from remote locations.

Benefits and Challenges of Virtual Teamwork

Virtual teams can
- Pull together the best people for a task
- Take advantage of the benefits of telecommuting
- Increase engagement and productivity

Virtual teams can pull together the best people for a task, even if they work in different offices or different countries. Companies and employees can take advantage of the economic and personal benefits of telecommuting, and employees in geographically dispersed firms can reduce the amount of travel and the wear and tear it has on them and their families. In many cases, virtual teamwork is the only option available, such as when a company outsources its manufacturing to a firm in another country and teams made up of employees from both companies need to collaborate frequently.

Virtual teams can also yield some surprising benefits. Multiple studies show that successful virtual teams can be more effective, more engaged, and more productive than *co-located teams* (those in the same physical location).[16]

However, virtual teams present some challenges that must be addressed by any firm that uses them:

Key challenges of virtual teams include the tools used for collaboration and interpersonal communication issues.

- Virtual teams rely on technology, so any limitations in the tools (such as a videoconferencing system with poor video or audio connections) will affect team performance.
- Interpersonal communication is a constant challenge in virtual environments. Teams play an important social role in many cases, for instance, and long-distance team members can develop a sense of emotional isolation and the feeling of being "out of the loop."
- Distance and separation can foster an "us versus them" mentality between geographic factions in a team.[17]
- Virtual teams often miss out on the random interactions that co-located teams experience, such as members running into one another while getting coffee or otherwise crossing paths in the office.[18]

Tips for Success in Virtual Team Environments

To overcome the inherent limitations of virtual collaboration, follow these tips:

To maximize the success of virtual teams
- Keep them as small as possible
- Use the best technology available
- Clarify the purpose of every tool
- Keep remote members in the loop
- Don't rely solely on written communication

- **Keep teams as small as possible.** Even more so than with co-located teams, virtual teams can run into trouble if their size grows larger than 10 people or so.[19]
- **Use the best collaboration technology available.** The tools can range from something as simple as text messaging up to elaborate collaboration platforms (see page 43).
- **Clarify the purpose of each tool.** Make sure that each kind of communication, such as schedule updates, task assignments, and urgent messages, is conveyed via one designated channel.[20]
- **Take special care with isolated members.** If most of the team is co-located and a few members are remote, assign responsibility to someone in the local team for keeping remote members in the loop.
- **Don't rely solely on written communication.** Pick up the phone or initiate video chats to maintain a more personal connection.

Collaborating on Communication Efforts

Businesspeople are frequently expected to collaborate on communication projects. This section offers advice on how to approach collaborative work, tips on giving and receiving feedback, and an overview of the technologies available for collaboration.

2 LEARNING OBJECTIVE
Offer guidelines for collaborative communication, explain what it means to give constructive feedback, and identify major collaboration technologies.

COLLABORATION ARRANGEMENTS

Communicators can collaborate in a variety of ways, from simple writer-editor relationships to full collaboration.

Writer-Editor Relationships

The writer-editor relationship is a common form of collaborative communication.

The simplest collaboration is when one person reviews the work of another, which happens quite often in business. Although the collaboration is relatively simple, the task of reviewing someone else's work requires care and awareness. A writer may also ask two or more people to review a report or presentation. For instance, you might ask an engineer to review a brochure for technical accuracy and a marketing specialist to review it for brand messaging. Page 163 in Chapter 6 offers tips on reviewing someone else's writing.

Always clarify roles and expectations before starting any collaborative writing project.

Stepping up a level from that, one person can be asked to revise another's work, which takes the second person into the realm of co-creator. For reviewing or revising, it's vital to clarify expectations up front. If your draft is solid but just needs technical verification, for example, you don't want your technical reviewer to rewrite it for style. If you're asking

MOBILE APP
Freedcamp is a free collaboration and project management system.

someone for a general review, a good approach for many situations is to give both parties complete freedom: The reviewer/editor is free to comment on and suggest changes to anything, and the writer is free to accept or reject each of those inputs. Change-tracking features in word-processing software make it easy to accept or reject changes one by one.

If you're asking someone to revise a draft you've written, explain your objectives for the piece, including the audience you want to reach and the message you intend to share. At that point, you need to release "emotional ownership" of the piece and allow your collaborator to revise and rebuild it as he or she sees fit.

Full Collaboration

Full collaboration involves working together from planning the message to final production. This sort of partnership can bring together a diverse range of talents, insights, and experiences, not to mention extra minds and hands to get the work done.

Most communication tasks lend themselves to collaboration, but think carefully before doing the actual writing as a team; group writing can be valuable but it can also be slow and frustrating.

Collaboration offers lots of potential, but it must be planned and managed thoughtfully to realize these benefits. Most of the tasks involved in creating communication pieces lend themselves quite nicely to team effort, but think carefully before composing as a group—that is, doing the actual writing itself. Composing as a group isn't always productive because writing is a highly individualized activity that requires thought and reflection, and most ideas can be expressed effectively in more than one way. Various people can have equally valid ways to express something and spend time trying to convince the group to use their versions. The result could be a slower process that doesn't produce meaningfully better results. Group writing can be done, and it can be a great way for an experienced writer to mentor a colleague, but recognize that it can be slow and occasionally frustrating.

You may find times when it is helpful to involve multiple writers, such as when you're struggling to express an idea clearly. However, chances are you'll find it more efficient to plan, research, and outline together but assign the task of writing to one person or divide larger projects among multiple writers.

If you divide the writing tasks, make sure you have a clear and complete outline first.

If you decide to divide the writing among two or more people, outline the entire document or presentation in detail first. This way, each writer knows exactly how his or her assigned section fits in the overall flow, which minimizes gaps and overlaps and reduces the work needed to "stitch" the pieces together into a cohesive whole. When the pieces are ready, assign one person to do a final revision pass to ensure a consistent style.

To ensure success with collaborative communication projects
- Agree on the goals first
- Map out how the work will be done
- Take advantage of each person's strongest skills
- Establish frequent checkpoints
- Accept different writing styles

However you structure a project, follow these tips:

- Make sure the project goals are clear and agreed on.
- Map out how the work will be done, including who will take the lead on each task and which systems and tools will be used.
- Structure the assignments so that each person can lend his or her greatest strengths to the effort.
- Establish frequent checkpoints so the team can verify that each task is coming along as expected and adjust plans if needed.
- Appreciate that people have different writing styles. If something works, support it, even if it's not the way you would say it.

GIVING—AND RESPONDING TO—CONSTRUCTIVE FEEDBACK

Constructive feedback focuses on the process and outcomes of communication, not on the people involved.

Collaborative communication often involves giving and receiving feedback about writing efforts. **Constructive feedback**, sometimes called *constructive criticism*, focuses on the process and outcomes of communication, not on the people involved (see Table 2.2).

When you receive constructive feedback on your writing, keep your emotions in check and view it as an opportunity to improve.

When you receive constructive feedback, resist the urge to defend your work or deny the validity of the feedback. Remaining open to criticism isn't easy when you've invested lots of time and energy in a project, but good feedback provides a valuable opportunity to learn and to improve the quality of your work.

TABLE 2.2 Giving Constructive Feedback

How to Be Constructive	Explanation
Think through your suggested changes carefully.	Many business documents must illustrate complex relationships between ideas and other information, so isolated and superficial edits can do more harm than good.
Discuss improvements rather than flaws.	Instead of saying "this is confusing," for instance, explain how the writing can be improved to make it clearer.
Focus on controllable behavior.	The writer may not have control over every variable that affects the quality of the message, so focus on those aspects the writer can control.
Be specific.	Comments such as "I don't get this" or "Make this clearer" don't give the writer much direction.
Keep feedback impersonal.	Focus comments on the message, not on the person who created it.
Verify understanding.	If in doubt, ask for confirmation from the recipient to make sure that the person understood your feedback.
Time your feedback carefully.	Respond in a timely fashion so that the writer will have sufficient time to implement the changes you suggest.
Highlight any limitations your feedback may have.	If you didn't have time to give the document a thorough edit, or if you're not an expert in some aspect of the content, let the writer know so that he or she can handle your comments appropriately.

In contrast to constructive feedback, *destructive feedback* is little more than complaining or bullying.

In contrast to constructive feedback, **destructive feedback** is little more than complaining or bullying. For example, "This proposal is a confusing mess, and you failed to convince me of anything" is destructive feedback. The goal is to be helpful: "Your proposal could be more effective with a clearer description of the manufacturing process and a well-organized explanation of why the positives outweigh the negatives." When giving feedback, avoid personal attacks and give the person clear guidelines for improvement.

TECHNOLOGIES FOR COLLABORATIVE COMMUNICATION

A wide variety of tools can help professionals work together, from editing features up to sophisticated collaboration platforms.

A variety of tools and systems are available to help writers collaborate on everything from short documents to presentations to formal reports. The simplest tools are software features such as *commenting* (which lets colleagues write comments in a document without modifying the document text) and *change tracking* (which lets one or more writers propose changes to the text while keeping everyone's edits separate and reversible). Some systems also support live, online collaboration so you can work on documents with other people at the same time.

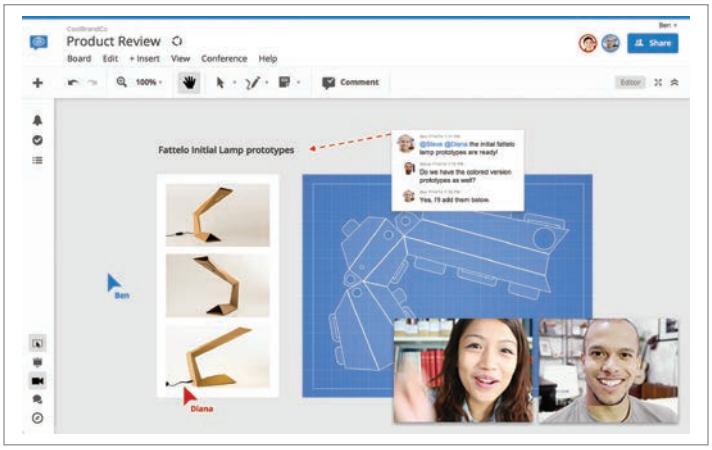
Collaboration Systems

Companies use a variety of systems to foster collaboration. Many of these rely on *cloud computing*, which means that the primary software and work files reside on the internet, making it easier for everyone on the team to gain access to the files.

Collaboration systems continue to evolve and add new capabilities, so the labels and the lines between various platforms are always a bit blurry, but here are some of the major types of collaboration platforms:

Collaboration platforms include
- Content management systems
- Wikis
- Shared online workspaces
- Social networks
- Workgroup messaging systems
- Intranets and extranets

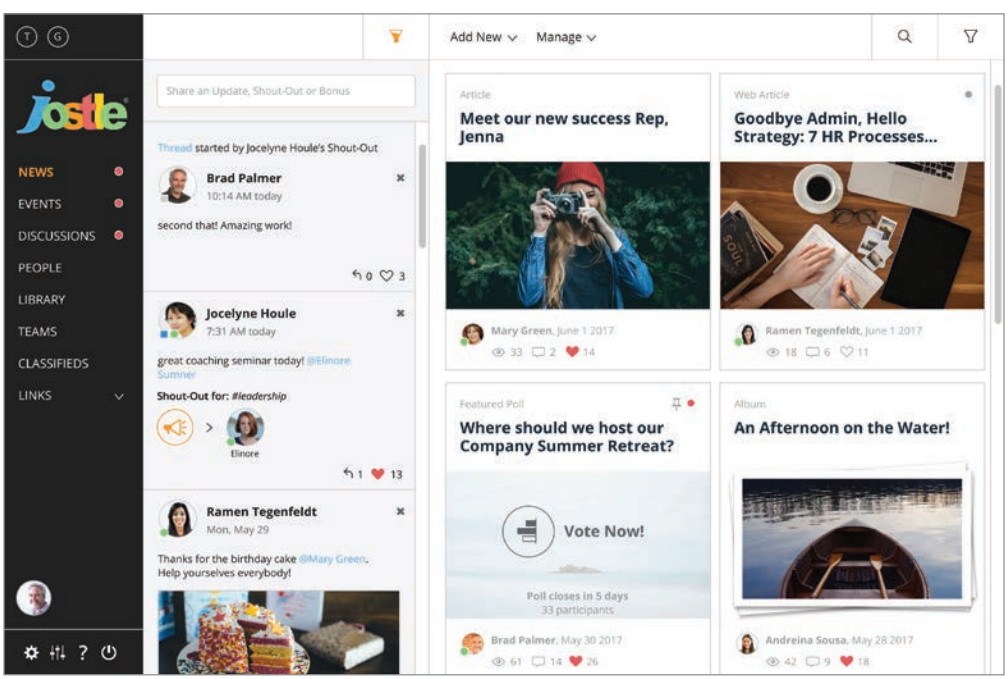
- **Content management systems** (**CMS**) help companies that produce a high volume of digital information for both internal and external distribution. These systems often include such features as *version control* (making sure two people can't unknowingly edit a document or page at the same time) and *work flow* features that define how content can be created, edited, and published.
- **Wikis** also organize digital content but in a much less structured and formal way than a CMS. A **wiki** is a website that allows anyone with access to add new material and edit existing material. Chapter 8 offers guidelines for effective wiki collaboration.
- **Shared online workspaces** are "virtual offices" that give everyone in a work group access to the same set of resources and information. Many offer real-time collaboration tools such as digital whiteboards where colleagues can brainstorm together (see Figure 2.2 on the next page).



Courtesy of Conceptboard

Figure 2.2 Shared Online Workspaces
Shared workspaces give employees remote access to all the files they need, from company reports to website content.

- **Social networks** are used extensively for business collaboration, and many companies have private, internal-only versions of social networks for their employees. Some companies use social networks to form *virtual communities* or *communities of practice* that link employees with similar professional interests throughout the company and sometimes with customers and suppliers as well. Chapter 8 has more on business uses of social networking.
- **Workgroup messaging systems** are evolving beyond basic messaging capability to include file sharing, meeting hosting, and other collaboration features.
- **Private networks** are essentially private versions of the internet with various communication and collaboration features. You may see some of these referred to as *intranets* (open to employees only) or *extranets* (open to employees and to selected outside parties by invitation only). Some intranets have now evolved into social networking systems that include a variety of communication and collaboration tools (see Figure 2.3).



©Jostle Corporation

Figure 2.3 Social Intranets
Social intranets such as Jostle help teams, departments, and entire companies communicate, celebrate, collaborate, and share resources.

INTELLIGENT COMMUNICATION TECHNOLOGY

Hi, I'm an Algorithm, Your New Teammate

If the thought of living in some sci-fi future where you work side by side with robot colleagues makes you uneasy, you might as well relax—you're already doing it. The internet and mobile phone apps are teeming with *bots*, pieces of software that perform a wide variety of tasks. They may not have mechanical arms and cute or creepy humanoid faces, but they are robots just the same.

The distinctions can be a little vague, but bots can be divided into two general categories: *taskbots* and *chatbots*. As their names suggest, one primarily handles chores and the other engages in conversation. Chatbots such as Apple's Siri and Amazon's Alexa use voice interaction, whereas many online chatbots use text input and output.

Taskbots are a key feature in robotic process automation, where they can take over tasks such as creating database reports, finding customer records, automating payroll, and processing orders. AI-enabled bots used in cognitive automation can become subject-matter experts and take over or assist with higher-level decision-making.

By one estimate, business professionals spend 10 to 20 percent of their work hours on routine tasks. With any luck, robotic teammates will handle the bulk of the mundane tasks in tomorrow's business environment and free up people to focus on strategic and creative thinking.

WHAT'S YOUR TAKE?

1. Would you rather work alongside a human teammate who occasionally makes mistakes that cost you time and energy or an AI-enabled taskbot that performs flawlessly? Explain your answer.
2. Would you be comfortable getting a medical diagnosis from a bot? Why or why not?

Sources: Suhasini Gadam, "AI, Automation, and the Future of Work," Automation Anywhere, 16 January 2019, www.automationanywhere.com; "Enabling Interaction with Bots," Slack, accessed 6 March 2019, www.slack.com; Clint Boulton, "How Messaging Bots Will Change Workplace Productivity," *CIO*, 1 February 2016, www.cio.com.

Collaboration via Mobile Devices

Mobile devices add another layer of options for collaborative writing and other communication projects. Today's mobile systems can do virtually everything that desk-based systems can do, from writing on virtual whiteboards to sharing photos, videos, and other multimedia files.[21] Mobility lets workers participate in online brainstorming sessions, seminars, and other formal or informal events from wherever they happen to be at the time.

An important aspect of mobile collaboration and mobile communication in general is **unified communication**, which integrates such capabilities as voice and video calling, voice and video conferencing, instant messaging, and real-time collaboration software into a single system.[22]

Unified communication integrates voice and video calling, conferencing, instant messaging, and other features in a single system.

AI-Enabled Collaboration

The latest innovation in collaboration tools is artificial intelligence, using AI-enabled bots and other tools to help people work more efficiently and effectively. For example, *taskbots* can assist teams with scheduling, data collection, document distribution, and other routine chores to give teams more time to focus on their work. Some bots can guide online discussions and project-update meetings. Systems such as Slack treat bots as team members; they can be assigned tasks and can assign tasks to their human teammates.[23] See "Intelligent Communication Technology: Hi, I'm an Algorithm, Your New Teammate."

Taskbots can help teams be more productive by taking over routine chores, such as scheduling.

Making Your Meetings More Productive

Much of your workplace communication will occur during in-person or online meetings, so your ability to contribute to the company—and to be recognized for your contributions—will depend to a large degree on your meeting skills. Well-run meetings can help companies solve problems, develop ideas, and identify opportunities. Meetings can also be a great way to promote team building through the experience of social interaction.[24] As useful as meetings can be, though, they can be a waste of time if they aren't planned and managed well.

3 LEARNING OBJECTIVE
List the key steps needed to ensure productive meetings.

PREPARING FOR MEETINGS

Check out the "Five-Minute Guide to Better Business Meetings" at the end of the chapter.

The first step in preparing for a meeting is to make sure the meeting is truly necessary. Meetings can consume hundreds or thousands of dollars of productive time while taking people away from other work, so don't hold a meeting if some other form of communication (such as a blog post) can serve the purpose as effectively.[25] If a meeting is indeed necessary, proceed with these four planning tasks.

Define the Meeting's Purpose

A good way to define the purpose of a meeting is to visualize the best possible outcome.

Meetings can focus on exchanging information, reaching decisions, or collaborating to solve problems or identify opportunities. Whatever your purpose, define the best possible result of the meeting (such as "we carefully evaluated all three product ideas and decided which one to invest in"). Use this hoped-for result to shape the direction and content of the meeting.[26] If you can't envision an ideal outcome from the meeting or express its purpose in a single sentence, keep brainstorming until you can narrow down to a specific purpose.

Select Participants for the Meeting

Keep meeting attendance as small as possible to ensure productive use of everyone's time.

The rule here is simple: Invite everyone who really needs to be involved, and don't invite anyone who doesn't. The more people you have, the longer it will take to reach consensus. Meetings with more than 10 or 12 people can become unmanageable if everyone is expected to participate in the discussion and decision-making. Of course, you can't always control who gets invited to meetings, but when you can, make deliberate choices.

Choose the Venue and the Time

If you can, optimize the seating to support the specific needs of each meeting.

Online meetings (see page 51) are often the best way and sometimes the only way to connect people in multiple locations or to reach large audiences. For in-person meetings, review the facility and the seating arrangements (see Figure 2.4). Pay attention to room temperature, lighting, ventilation, acoustics, and refreshments; these details can make or break a meeting. If you have control over the timing, morning meetings can be more productive because people are generally more alert and not yet engaged with the work of the day.

Set the Agenda

A good agenda identifies
- What needs to happen in the meeting
- Which issues are most important to discuss
- What information is required to discuss them

The success of any meeting depends on preparation. Distribute a carefully written *agenda* to participants, giving them enough time to prepare as needed (see Figure 2.5 on page 48). A productive agenda answers three questions: (1) What do we need to do in this meeting to accomplish our goals? (2) What issues will be of greatest importance to all participants? (3) What information must be available to discuss these issues?[27] Your company may have a standard agenda template for meetings; if not, you can get templates within Microsoft Word or other programs.

In addition to the detailed planning agenda, you may also want to prepare a simpler presentation agenda to use during the meeting (see Figure 2.6 on page 48). You can use this version to keep the meeting on track and remind everyone of how much time is allotted for each step.

LEADING AND CONTRIBUTING TO EFFICIENT MEETINGS

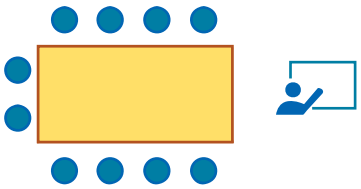
Everyone shares the responsibility for successful meetings.

Everyone in a meeting shares the responsibility for making the meeting productive. If you're the leader, however, you have an extra degree of responsibility and accountability. The following guidelines will help leaders and participants contribute to more effective meetings:

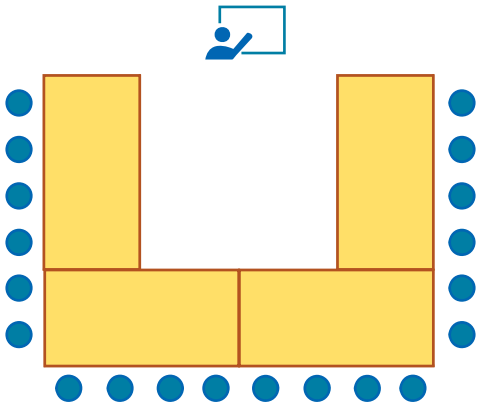
- **Keep the discussion on track.** Good leaders occasionally need to guide, mediate, probe, stimulate, summarize, and redirect discussions that have gotten off track. Don't leave it all in the leader's hands, however; everyone should help keep the meeting focused and moving forward.[28]

Make sure all styles of communicators have the opportunity to share their ideas.

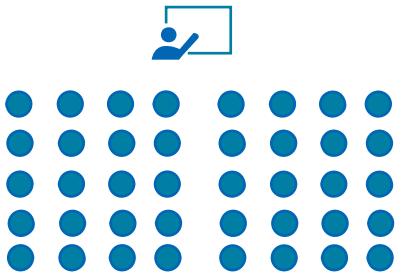
- **Follow agreed-on rules.** The larger the meeting, the more formal you need to be to maintain order. Formal meetings sometimes use **parliamentary procedure**, a



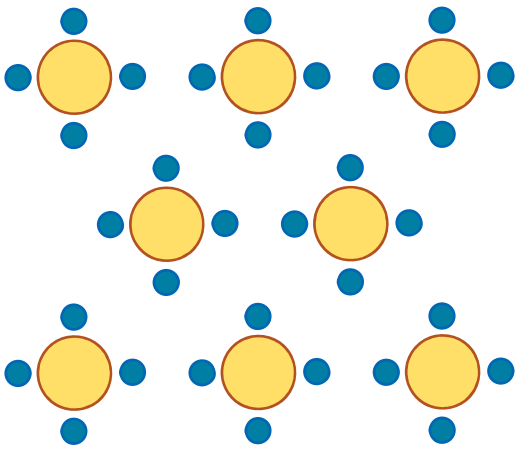
Conference room
Ideal for small meetings and working sessions; also works for small presentations by positioning presenter at one end of the table; promotes conversation among all attendees



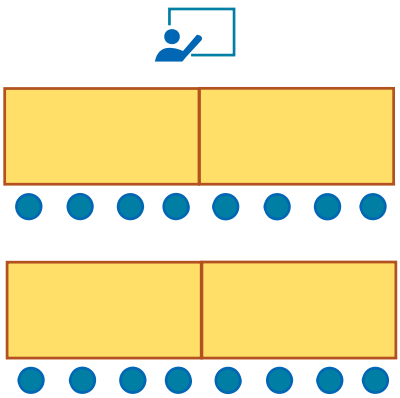
U-shape
Ideal for mid-sized meetings and working sessions; works nicely for presentations and gives the presenter the freedom to walk around the interior for closer interaction with attendees; also supports conversation among attendees



Theater/auditorium style
Best for large audiences but limits interaction between presenter and audience and among audience members; difficult for audiences to work with documents or devices unless chairs include desk surfaces



Breakout sessions
Useful for working meetings or seminars in which you ask the audience to split into groups and engage in role playing, brainstorming, or problem solving; prevents interaction between groups, however



Classroom style
Good alternative to theater/auditorium style when you want to give participants more work surface for devices and documents; less opportunity for interaction and conversation than U-shape

Figure 2.4 Meeting Room Configurations
If you have the option of configuring the meeting room, select the best seating arrangement for each meeting's purpose. Here are some of the more common configurations and their best uses for meetings and presentations.

time-tested method for planning and running effective meetings. The best-known guide to this procedure is *Robert's Rules of Order*.

- **Encourage and moderate participation.** Some people like to think out loud, using discussion to help clarify their own thoughts. Others prefer to finalize their thoughts before speaking. Effective meeting leaders need to accommodate both styles, in addition to making sure that people who may not feel comfortable speaking up or who have been interrupted by more assertive participants have the chance to be heard.[29]

Merger Issues Brainstorming Session

Location:	Building C, Saratoga room
Date:	August 8
Time:	9:00 to 12:00
Facilitator:	Irene Belden
Objectives	• Identify/confirm all major issues and problems in each functional area • Identify any cross-functional issues • Give functional managers information they need to formulate action plans
Prestudy:	Please download and read Merger Brainstorming Session Prestudy.docx

Agenda items

Time slot	Topic	Discussion leader
9:00-9:15	**Introductions:** Please be prepared to briefly describe your role on the transition team.	Irene Belden
9:15-10:00	**General transition costs:** Key items identified so far are severance packages, infrastructure investments, and service contracts.	Kip Selbach
10:00-10:15	**Break**	
10:15-11:00	**Information systems:** Key issues are migration to cloud computing and choice of internal communication platform.	Summer Bowman
11:00-11:45	**Marketing and sales:** Key issues are brand integration, sales force realignment, and quota and commission questions.	Ed Delahanty
11:45-12:00	**Wrap up:** Last call for questions and concerns; we want to make sure functional managers go away with every significant issue in hand so they can develop concrete action plans.	Irene Belden

Please send any questions to irene.belden@calypsonet.com

Figure 2.5 Effective Meeting Agenda: Full Version
A meeting agenda should provide all attendees with the information they need to plan for the meeting. Compare this full *planning agenda* with the shorter *presentation agenda* in Figure 2.6.

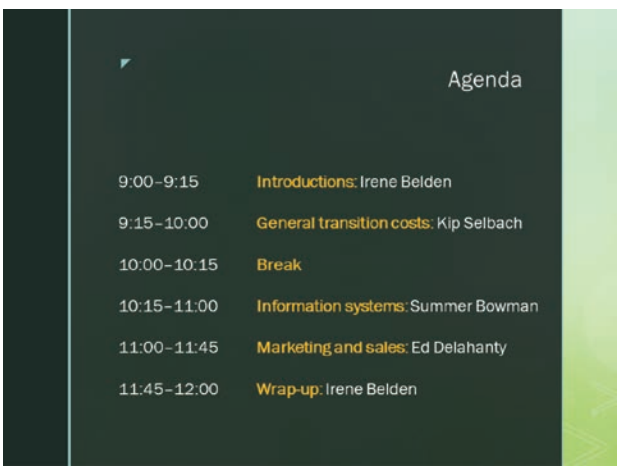


Figure 2.6 Effective Meeting Agenda: Condensed
This presentation slide shows a condensed version of the meeting agenda from Figure 2.5. The meeting facilitator can use a slide such as this to introduce each agenda item and keep the meeting on schedule.

- **Participate actively.** Make a point to contribute to the progress of the meeting and the smooth interaction of participants. Speak up if you have something useful to say, but don't talk or ask questions just to demonstrate how much you know about the subject at hand.
- **Don't interrupt.** Even if you're an expert in the subject matter or the discussion is getting heated, respect everyone's right to participate. Meetings can be dominated by the most aggressive participants, but the loudest people don't necessarily have the best ideas.
- **Use mobile devices respectfully.** Using mobile devices for taking notes during a meeting or presentation is becoming common, but make sure it is accepted practice in your company before you do so.
- **Close effectively.** At the conclusion of the meeting, verify that the objectives have been met or arrange for follow-up work, if needed. Summarize the general conclusion of the discussion and any actions to be taken. Make sure all participants understand and agree on the outcome.

Norms regarding mobile device usage vary widely; make sure you understand what your team or company expects.

PUTTING MEETING RESULTS TO PRODUCTIVE USE

In most cases, the value of a meeting doesn't end when the meeting ends. For example, problems or opportunities brought up during a meeting need to be addressed, any action items assigned during the meeting need to be acted on, and key decisions and announcements should be distributed to anyone who is affected but was unable to attend. Having a written, audio, or video record of a meeting also gives the participants a chance to verify their impressions and conclusions.

The conventional method of recording meetings is through written **minutes**, a summary of the important information presented and the decisions made (see Figure 2.7 on the next page). One person is usually assigned to keep notes as the meeting progresses and then to share them afterward.

Minutes are written summaries of important information presented and the decisions made in meetings.

The specific format of the minutes is less important than making sure you record all the key information, particularly regarding responsibilities that were assigned during the meeting. Typical elements include a list of those present and a list of those who were invited but didn't attend, followed by the times the meeting started and ended, all major decisions reached at the meeting, all assignments of tasks to meeting participants, and all subjects that were deferred to a later meeting. Minutes should objectively summarize important discussions, noting the names of those who contributed major points. Any handouts, slides, or supporting documents can be attached to the minutes when they are distributed.

Depending on the meeting technologies at your disposal, you may have software specifically designed to record, distribute, and store meeting minutes (see Figure 2.8 on page 51). Some systems automatically forward action items to each employee, record audio discussions for future playback, and make all the relevant documents and files available in one convenient place.[30]

To review the tasks that contribute to productive meetings, refer to "Checklist: Improving Meeting Productivity."

CHECKLIST ✓ Improving Meeting Productivity

A. Prepare carefully.
- Make sure the meeting is necessary.
- Decide on your purpose.
- Select participants carefully.
- Choose the venue and the time; adapt the seating if possible.
- Create and distribute a clear and detailed planning agenda.

B. Lead effectively and participate fully.
- Keep the meeting on track.
- Follow agreed-on rules.
- Encourage and moderate participation.
- Participate actively.
- Don't interrupt.
- Use mobile devices respectfully and in line with group norms.
- Close effectively.

C. Put the results to effective use.
- Distribute meeting minutes to participants and other interested parties.
- Make sure task assignments are clearly communicated.

Employee Onboarding Update

March 16
2:00 p.m. to 3:00 p.m.

Meeting called by: Alex Gardner **Type of meeting:** Status update

Facilitator: Jessica Knowdell **Note taker:** Frank Isbell

Attendees: Alex Gardner, Frank Isbell, Jessica Knowdell, Steve Ladew, Ally Lawson, Bill Swarback, Jessie Tannehill, Toni Von Fricken, Dale Williams

Minutes

Agenda item: New orientation presentation **Presenter:** Toni Von Fricken

Discussion:

Toni reports that the new slide presentation is complete and will be test-run with a group of volunteers from HR on March 30.

Steve offered to convert the slides to a video and post on the intranet.

Action items	Person responsible	Deadline
✓ Test-run new orientation presentation; fine-tune as needed	Toni VF	April 2
✓ Convert finished slides to video and post on employee intranet	Steve L	April 10

Agenda item: Update employee handbook and improve access **Presenter:** Jessica Knowdell

Discussion:

Team reached agreement that a wiki is the best platform for hosting the handbook.

We decided on a three-level access plan:

Level 1: Access open to all HR employees, but new posts and edits must be approved by division HR directors to ensure compliance (for all policy-related documents and regulatory forms)

Level 2: Access open to all HR employees, with immediate posting and editing allowed (for all non-policy documents, HR event updates, wellness bulletins, and similar items)

Level 3: Access open to all employees, with immediate posting and editing allowed (for all employee social clubs, charity events, and similar items)

Action items	Person responsible	Deadline
✓ Discuss wiki plan with intranet platform vendor	Jessica K	April 5
✓ Vendor to design access controls	Jessica K (vendor contact)	April 20
✓ Announce new wiki to employee base	Dale W, Jessica K	May 1

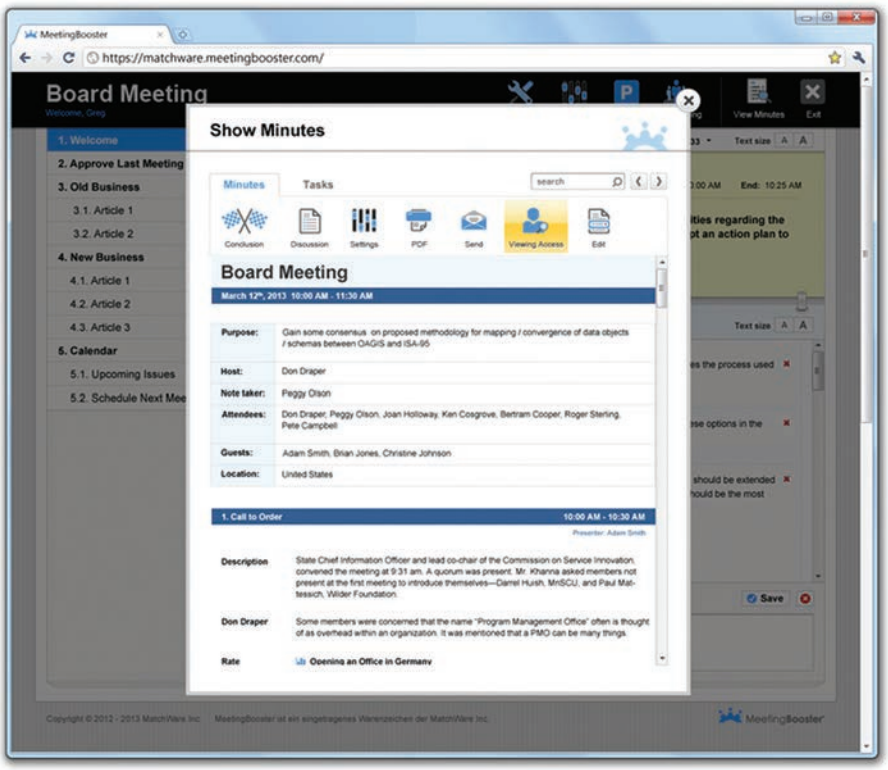
Agenda item: Brainstorm ideas for mentor matching program **Presenter:** Ally Lawson

Discussion:

Ally presented research on mentoring programs, including best practices and pitfalls.

Alex will bring up issue of volunteer vs. mandatory mentoring at May executive council.

Figure 2.7 Effective Meeting Minutes
Meeting minutes should record all the information that participants may need to refer to later. Depending on the circumstances, you might want to include information that anyone who wasn't able to attend can review to get a summary of key discussion and decision points.



©MeetingBooster

Figure 2.8 Capturing Key Decisions and Discoveries from a Meeting
Meeting tools such as the MeetingBooster system help teams and other groups capture decisions and discoveries from meetings and put this information to productive use.

CONDUCTING VIRTUAL MEETINGS

Virtual meetings are meetings in which people join in from two or more locations and connect via some form of communication technology. Such meetings are common in business today, so it's important to know how to run a virtual meeting and how to get the most out of one as a participant. Chances are you'll also participate in online seminars, often referred to as *webinars*.

Virtual meetings allow people to join in from two or more locations and connect via some form of communication technology.

Virtual Meeting Systems

The tools for virtual meetings range from conference calls and group messaging chats to real-time collaboration systems and *telepresence* systems with immersive video so realistic it can seem like people thousands of miles away are sitting across the table.[31] The most exotic systems can transmit *holograms*, beaming live, three-dimensional replicas of participants long distance.[32]

Teleconferencing is an easy and inexpensive choice that works well for many routine meetings. However, if the meeting will cover complex topics, explore issues with a strong emotional component, or require brainstorming or other interactive participation, some form of video link is highly desirable. Video supports a much wider range of nonverbal communication, and the ability to see one another helps new team members form closer bonds in less time (see Figure 2.9 on the next page). Fortunately, videoconferencing no longer requires expensive, dedicated systems. Several smartphone apps support small group video calls, and WebRTC (for *real-time communication*) capability lets people communicate via video through standard web browsers and mobile apps.[33]

MOBILE APP
Cisco WebEx Meetings gives you mobile access to one of the world's most popular online meeting platforms.

Tips for Successful Virtual Meetings

Virtual meetings require an extra level of planning and attention, in addition to the meeting planning steps covered earlier. Keeping people engaged can be more challenging, particularly in audio-only meetings. Follow these tips:



Zoom Video Communications

Figure 2.9 Virtual Meetings
Today's videoconferencing systems help virtual teams and geographically dispersed organizations communicate more effectively.

Conducting successful virtual meetings requires extra planning beforehand and more diligence during the meeting.

- Make sure the meeting has a well-defined task so that it steadily moves toward a goal and discourages people to fill the time with unrelated tasks.[34]
- Provide prestudy materials as needed, in addition to the agenda. Let participants know what will be expected of them.
- For large meetings, assign people to specific roles, such as a facilitator who guides the discussion, a technical specialist who can help people if they experience difficulties with their connections without interrupting the meeting, and someone to record the minutes.[35]
- Make sure everyone has up-to-date versions of whatever software tools you plan to use.
- If all the participants don't know each other, the facilitator should perform introductions or ask people in turn to introduce themselves.[36]
- If the system doesn't offer a way for people to virtually "raise their hands" to ask a question, the facilitator should explain how to pose questions.
- Log in on time. Meeting systems often announce or signal as each person checks in, and it's highly disruptive when latecomers log in after the meeting has started.

Avoid the temptation to multitask during a virtual meeting; stay present for your own benefit and the benefit of others.

- Be present, mentally and emotionally. Staying present shows respect for others, and it could save you from embarrassment if you get called on unexpectedly.
- Mute your audio input if you need to cough or otherwise make noise. Most systems have a microphone icon or mute button you can press.
- If you type to take notes, make sure noise from your keyboard won't distract others. If necessary, mute your audio while typing.

During virtual meetings, check in with everyone frequently to see if there are any points of confusion or disagreement.

- As you work through each agenda item, summarize what has been discussed and ask if anyone has questions or comments.[37]
- As the facilitator, periodically check in with each person, if feasible. For instance, if someone hasn't spoken in a while, you might address a person by name and ask, "Does that work for you?" or "Do you have anything to add?"

4 LEARNING OBJECTIVE
Explain why listening is such a complex communication process, and describe three steps to becoming a better listener.

Improving Your Listening Skills

Much of this course focuses on improving your skills as a sender of messages, but successful communication requires the mindful participation of both the sender and the receiver. When you are engaged in a conversation or listening to a live or recorded speaker,

the success of the communication effort hinges on your performance as a listener.[38] As Salesforce's Marc Benioff (see page 35) would emphasize, listening is essential for acquiring information needed to create companies, to perform on the job, and to build a foundation for trust and successful relationships.[39]

Effective listening is more difficult than it might seem and requires active involvement to be successful.

You've been listening all your life, so it's natural to assume it's something you do well without even thinking about it. However, listening is a more complex process than you might imagine, and you surely know from your own life experiences how often listening can be unsuccessful.

This section explains why effective listening is more difficult than it seems and then outlines three positive steps you can take to become a more effective listener. (Note that even if your physical ability to hear is impaired, most of the issues and techniques discussed in this section can help.)

UNDERSTANDING WHY LISTENING IS SUCH A COMPLEX PROCESS

Listening is vulnerable to all the potential barriers and breakdowns that you considered in Chapter 1's discussion of the communication process, plus there are several difficulties that are unique to listening. In addition, various listener behaviors can get in the way of successful communication (see Table 2.3).

The Unique Challenges of Listening

Because conversations and presentations happen in real time, you must stay engaged the entire time to avoid getting confused or lost.

Listening involves three unique challenges. First, conversations and presentations happen in real time, meaning you must be engaged while the speaker is talking and stay engaged the entire time. If you want to verify something or attend to an interruption while you're reading, you can simply pause and pick it up again later. However, doing so is awkward at best and sometimes impossible when you're in the middle of a live conversation or listening to a presentation. (Of course, if you're listening to a podcast or other recorded speech, you can pause and come back later.)

Unlike written documents, speech doesn't give you a visual record to review if you get lost or confused.

Second, speech is invisible, in that you don't have written words to refer to if you get lost or confused. If your mind drifts for a moment while reading, you can scan back up the page to figure out what is going on. You don't have that luxury with conversation. If you get lost, you must ask the other party to stop the conversation and repeat or re-explain. While this conversational interactivity can be one of the key advantages of oral communication, it isn't always easy or possible. For instance, if the speaker is a top

TABLE 2.3 Factors That Complicate the Listening Process

Unique Challenges of Listening	Individual Choices and Behaviors
Real-time experience Conversation is consumed as it is created; you can't scroll back in time like you can with written communication.	**Poor self-management** Listeners need to actively manage their own emotions during a conversation; otherwise, these distractions will get in the way.
Invisibility You can't see spoken language, so you have no visual record to refer to if you get lost or confused.	**Idle brain power** The mind can process information several times faster than people can talk, and if listeners don't harness that extra processing power, their minds are likely to wander.
Sound-to-language conversion Incoming sounds must be converted to language before your mind can begin to process what is being said. Mumbling, strong accents, and ambient noise can all complicate this process.	**Ineffective listening style** Different conversations call for different styles of listening, and using an inappropriate style can hamper a conversational exchange.
	Barriers Listeners need to take steps to minimize barriers in their listening environment in order to reduce interruptions and distractions.
	Flawed recall If listeners don't record or actively memorize essential information during a conversation, chances are they will forget or confuse important details.

executive in your company or a trainer in a seminar, it can be intimidating to admit you are confused or weren't paying attention. Too often, it's tempting to stay quiet and hope you can guess what the speaker said or meant.

The need to convert incoming sounds to understandable language is a unique challenge of listening.

Third, before listeners can begin to decode incoming messages, they need to convert incoming sounds into recognizable words and sentences. Doing so adds a layer of complexity that doesn't exist in other media, and a variety of barriers can get in the way, including ambient noise, a speaker who is mumbling or who has a strong accent, and physical difficulties in hearing.

Choices and Behaviors That Affect Listening Quality

In addition to the generic challenges of listening, a variety of listener choices and behaviors can also degrade the quality of a communication exchange.

Listeners need to manage their emotions to avoid creating mental barriers and distractions.

- **Poor self-management.** Communication suffers if listeners fail to monitor and manage their emotions during a conversation. During the hectic workday or when emotions are running high, listening calmly and mindfully can be a challenge. However, these are the times when it is most important to exhibit emotional intelligence, including the ability to recognize when your emotions might be getting in the way.[40]
- **Idle brain power.** Your brain can process language three or four times faster than people typically speak, which means your brain has a lot of extra processing capacity while you're listening.[41] If you don't take active steps to keep focused, your mind will inevitably wander.
- **Ineffective listening style.** Even when listeners are actively engaged in conversations, the exchange can still suffer if they don't use the best *style* of listening for the situation at hand. See "Adapt Your Listening Style to the Situation" on page 55.
- **Barriers to physical reception.** Before you can listen to someone, you obviously need to be able to hear the other party speak. Missing even a single word can lead to confusion and misunderstanding. Poor hearing can originate on the speaker's side (such as when someone mumbles), on the receiver's side (such as when someone is listening to music during a conversation), or in the surrounding environment (such as when other people in an open-plan office are talking).

Memorization is an integral part of listening and can be a challenge because you need to store information you've just heard while new information continues to reach your ears.

- **Flawed recall.** Remembering information during a conversation is challenging because you need to store information you have just received while continuing to process new incoming information. This problem gets even more pronounced when the speaker is rambling or disorganized or fails to periodically summarize what he or she has said.

When you consider the complexity of the listening experience, it's not surprising that listening well is a universal challenge. Fortunately, with awareness and effort, everyone can take steps to overcome these hurdles.

BECOMING A BETTER LISTENER

Now that you have a sense of how listening can go off track, here are three vital steps to becoming a better listener: minimizing the barriers to effective listening, adapting your listening style to the situation, and engaging in active listening.

Minimize the Barriers to Effective Listening

External barriers to listening are any factors that impede physical hearing or concentration.

You might not be able to control all the barriers that get in the way of effective listening, but the more you can reduce them, the more satisfying the experience will be for everyone involved. *External barriers* are anything in the environment or communication channel that make it difficult to hear the other party or focus on what is being said. If you can't fix a problem, take steps to minimize its effects, such as confirming key information by summarizing what you've heard during the call or later in

writing. If you're having trouble hearing, let the other party know so you can both work to resolve the situation. Don't try to guess at what someone might have said and hope for the best.

Internal barriers are listener behaviors, thoughts, and emotions that hinder one's ability to understand, interpret, or accept what someone else is saying. They may not be as obvious as external barriers, but they can be much more disruptive. If you're not paying attention or are dividing your attention by multitasking, you will miss verbal information and nonverbal signals. Moreover, not paying attention is disrespectful and sends a message to the other person that what he or she has to say isn't important to you.[42]

Internal barriers to listening are listener behaviors, thoughts, and emotions that hinder understanding.

Selective attention and perceptual biases can lead listeners to mold messages to fit their own beliefs and conceptual frameworks. Listeners sometimes make up their minds before hearing the speaker's full message, or they engage in *defensive listening*—protecting their egos by tuning out anything that doesn't confirm their beliefs or their view of themselves. Feeling angry or annoyed during a conversation limits your effectiveness because you'll be more likely to judge or reject what you hear. "Listen Actively," starting on page 56, offers helpful advice for getting yourself in the right frame of mind.

Defensive listening involves protecting your ego by tuning out anything that doesn't confirm your beliefs or view of yourself.

Adapt Your Listening Style to the Situation

Effective listeners adapt their listening styles to different situations, including switching approaches over the course a conversation or presentation. You can use three distinct styles: *content* listening, *critical* listening, and *empathic* listening (see Table 2.4). Note that all three of these are forms of *active listening* (see the next section).

The primary goal of **content listening** is to understand and retain the information in the speaker's message. It doesn't matter whether you agree or disagree, approve or disapprove—only that you understand. Filter out anything other than the information itself, including the speaker's appearance, vocabulary, level of experience, or position in the company. If appropriate, ask questions to clarify any points you don't understand or to get more details. However, don't challenge or correct the speaker. Remember that your goal with content listening is to get the information that another person has to share. If the exchange starts to feel confrontational, he or she might "shut down" and hesitate to disclose valuable information.

Content listening is listening primarily to understand and retain the information in the speaker's message without evaluating it.

Critical listening goes beyond information gathering to evaluate the meaning of the speaker's message on several levels: the logic of the argument, the strength of the evidence, the validity of the conclusions, the implications of the message, the speaker's intentions and motives, and the omission of any important or relevant points. If you're skeptical, ask questions to explore the speaker's point of view and credibility. Be on the lookout for bias that might influence how the information is presented, separate opinions from facts, and watch for logical fallacies that could undermine the speaker's arguments or conclusions.[43] (Note that "critical listening" does not mean you are listening with the intent to criticize but rather to understand the full meaning and implications of the speaker's message.)

Critical listening adds the element of evaluation to content listening; it's not listening to criticize but rather to critically evaluate the message and the speaker's intentions.

TABLE 2.4 Three Styles of Listening

Listening Style	Goal
Content listening	Understand and retain the information the other party is sharing
Critical listening	Understand and evaluate the information in terms of logical arguments, strength of evidence, validity of conclusions, implications, and any omissions; understanding the speaker's motives may be relevant as well
Empathic listening	Understand the speaker's feeling, needs, and wants, regardless of whether you agree with his or her perspective

The goal of *empathic listening* is to understand the speaker's feelings, needs, and wants regardless of the information being shared.

The goal of **empathic listening** is to understand the speaker's feelings, needs, and wants so that you can appreciate his or her point of view, regardless of whether you share that perspective. Importantly, this style of listening gives the other person the freedom to share without fear of being judged or evaluated.[44] In this sense, empathic listening is a complementary skill to critical listening because you need to silence your critical faculties and focus your attention on the other person. In fact, the information exchanged in an empathic conversion is sometimes less important than simply giving someone the opportunity to be heard. Be aware that empathic listening can be a difficult habit to get into, particularly for people who are used to solving problems and taking charge of situations.[45]

Listen Actively

Active listening is making a conscious effort to engage with other people and to turn off your internal filters and biases to truly hear and understand what they are saying. (Content, critical, and empathic listening are all forms of active listening.)

To listen actively, start by putting yourself in an open and positive frame of mind.

By now, you probably recognize the most important point to understand about listening, which is that to be effective, it must be an *active* process. Listening well requires energy, effort, and attention. **Active listening** is making a conscious effort to engage with other people and to turn off your internal filters and biases in order to truly hear and understand what they are saying. This section describes five ways to help you listen more actively (see Table 2.5).

Put Yourself in an Open and Positive State of Mind Effective listening begins with putting yourself in the right frame of mind, which requires a conscious commitment to the other person and to the time you will be spending. Even if you aren't interested in the topic or aren't in the mood, you can will yourself to listen by viewing it as an opportunity to learn or to help. The more willing you are to listen, the better you'll be able to concentrate and the higher the chance that you'll accurately interpret what the other person is saying.[46]

Prepare yourself to have your beliefs challenged and to learn new information.[47] Accept that you might not have all the answers, even if you are an expert or the person in charge. This will help open your mind to what other people are saying.[48] To improve over time, commit to examining your own listening behaviors and, if necessary, changing how you listen to others.[49]

Keep Yourself Engaged As the discussion moves along, commit to staying engaged, which requires consciously managing your behaviors, thoughts, and emotions. Remember that your brain has excess processing capacity while you're listening, and it will wander off and find new things to think about if you let it. *Compartmentalizing* any thoughts and emotions unrelated to the topic at hand can also help you stay focused and engaged. If you are worried or excited about something unrelated to the conversation, visualize putting that emotion in a box inside your mind with the understanding that you will attend to it later.

Respect Silence Don't automatically speak at the first moment of silence. Sometimes silence is an important part of the conversation. The other person might be collecting his or her thoughts or looking for a clearer way to express something.[50] Also, if someone pauses in the middle of a sentence, don't rush in to complete it—particularly if your real motivation is to demonstrate superior knowledge or intelligence.[51]

TABLE 2.5 Five Elements of Active Listening

Element	Why It's Important
Open and positive state of mind	This mindset makes you receptive to new information and positive about the experience of listening to this person.
Active engagement	If you don't commit to being in and staying in the conversation, your mind will wander and the other person will sense that you aren't fully engaged.
Respect for silence	A moment of silence might be the speaker collecting or reconsidering his or her thoughts; if you step in too soon, you could interrupt the flow.
Nonverbal awareness	Intentional and unintentional nonverbal signals can explain and amplify the speaker's message.
Thoughtful note-taking	If the information is important, don't rely on your memory; it's too easy to forget key details.

Pay Attention to Nonverbal Signals One of the advantages of oral communication over written formats is the ability to see what isn't being said in the form of *nonverbal signals*. These include hand gestures, facial expressions, posture, eye contact, and so on. As "Improving Your Nonverbal Communication Skills" on page 58 explains, the information in the signals can strengthen, weaken, or even replace spoken language.

Take Thoughtful Notes If the information you are likely to receive is important, write it down. Don't rely on your memory. Chances are you will forget or confuse important details. Of course, the decision whether to take notes depends on the situation. If someone is sharing personal or confidential information or is asking for your advice, it might not be appropriate or necessary to take notes. If you are using a laptop or mobile device to take notes, make sure you can do so quickly enough to keep up with the conversation and in a way that doesn't disturb others.

Don't rely on your memory if you are hearing important information that you will need to act on later; record it or write it down.

In addition to recording information for later use, taking notes can help you engage with the speaker during a conversation or presentation. For instance, if you have questions or concerns, you can list them in your notes and refer to them when it's convenient to ask or during a scheduled question-and-answer period. Notes also help you stay engaged, and they can help you evaluate information when you are using critical listening.[52]

If you are unable to take notes and have no choice but to memorize, you can hold information in short-term memory by repeating it silently or creating lists in your head. To store information in long-term memory, four techniques can help: (1) associate new information with something closely related (such as the restaurant in which you met a new client), (2) categorize the new information into logical groups (such as alphabetizing a list of names), (3) visualize words and ideas as pictures, and (4) create mnemonics such as acronyms or rhymes.

If you have no choice but to memorize information you are hearing, take active steps to transfer it from short-term memory to long-term memory.

Table 2.6 summarizes the habits of effective and ineffective listeners. For a quick reminder of the steps you can take to become a better listener, see "Checklist: Improving Your Listening Skills."

TABLE 2.6 Behavioral Differences Between Effective and Ineffective Listeners

Effective Listeners	Ineffective Listeners
Listen actively	Listen passively
Put themselves in an open, positive frame of mind	Switch to listening without consideration, continuing in whatever emotional state they were in before
Stay focused on the speaker and the conversation	Allow their minds to wander, are easily distracted, or work on unrelated tasks
Take careful notes, when applicable	Take no notes or ineffective notes
Make frequent eye contact with the speaker (depends on culture to some extent)	Make little or no eye contact—or inappropriate eye contact
Keep their emotions under control and don't let their own anxieties poison the conversation	Allow their emotions to negatively influence the conversation
Mentally paraphrase key points to maintain attention level and ensure comprehension	Fail to paraphrase
Adjust listening style to the situation	Listen with the same style, regardless of the situation
Give the speaker nonverbal feedback (such as nodding to show agreement or raising eyebrows to show surprise or skepticism)	Fail to give the speaker nonverbal feedback
Save questions or points of disagreement until an appropriate time	Interrupt whenever they disagree or don't understand
Engage the other person with questions or encouragement; validate the other person's feelings	Fail to engage; offer no encouragement or expression of understanding
Overlook stylistic differences and focus on the speaker's message	Are distracted by or unduly influenced by stylistic differences; are judgmental
Make distinctions between main points and supporting details	Are unable to distinguish main points from details
Look for opportunities to learn	Assume they already know everything that's important to know

Sources: Judi Brownell, *Listening: Attitudes, Principles, and Skills,* 6th ed. (New York: Routledge, 2018), 6, 10–11, 19–20, 88–89; Jack Zenger and Joseph Folkman, "What Great Listeners Actually Do," *Harvard Business Review*, 14 July 2016, www.hbr.org; Amy Jen Su and Muriel Maignan Wilkins, "What Gets in the Way of Listening," *Harvard Business Review*, 14 April 2016, www.hbr.org; Madelyn Burley-Allen, *Listening: The Forgotten Skill,* 2nd ed. (New York: Wiley, 1995), 70–71, 119–120; Larry Barker and Kittie Watson, *Listen Up* (New York: St. Martin's, 2000), 8, 9, 64.

CHECKLIST ✓ Improving Your Listening Skills

- Recognize the unique challenges of listening and take steps to overcome them.
- Lower external barriers to physical reception whenever you can, such as minimizing ambient noise.
- Lower internal barriers to reception and understanding by monitoring and managing your own emotions.
- Try not to slip into defensive listening; be open to what you are hearing, even if you don't agree.
- Adapt your listening style to each situation.
- Commit to listening actively—put yourself in an open and positive frame of mind, keep yourself engaged, respect silence, be aware of nonverbal signals, and take notes if appropriate.
- Don't rely on your memory; write down or record important information.

Improving Your Nonverbal Communication Skills

5 LEARNING OBJECTIVE
Explain the importance of nonverbal communication, and identify six major categories of nonverbal expression.

Nonverbal communication is the process of sending and receiving information, both intentionally and unintentionally, without using language.

Nonverbal signals can convey a significant amount of information, but disregard any claims you might have heard about them conveying a specific percentage of message content.

Nonverbal communication is the process of sending and receiving information, both intentionally and unintentionally, without using language. Nonverbal signals play a vital role in communication because they can strengthen or repeat a verbal message (when the nonverbal signals match the words), weaken or contradict a verbal message (when nonverbal signals don't match the words), or replace words entirely.[53] Nonverbal signals aren't limited to your facial expressions, gestures, and other personal behaviors.

Nonverbal signals are a factor in virtually every instance of communication, and they can convey a significant portion of the information and emotions shared in interpersonal communication.[54] In fact, you may have heard the claim that nonverbal signals convey *most* of the message in face-to-face communication. You might even see specific percentages, such as that words carry only 7 percent of meaning and nonverbal elements carry 93 percent (with tone of voice making up 38 percent of that and body language the other 55 percent). However, the experiments that produced these figures more than 50 years ago attempted only to assess the feelings of the speaker and have not been confirmed by other research.[55] These percentages do not apply as a rule about nonverbal communication, so ignore any claim about words carrying only 7 percent of your meaning.

RECOGNIZING NONVERBAL COMMUNICATION

Nonverbal communication is complex: Not all signals are controllable, and signals don't always mean what people think they mean.

Nonverbal communication is an intriguing part of business communication because it is both complex and somewhat difficult to pin down. On the sending side, some nonverbal signals are controllable (such as choosing what to wear), some are habits you may not even think about (tapping your fingers when you're impatient, for instance), some are trainable (using specific hand gestures during a presentation), and some are involuntary (such as blushing).[56]

On the receiving side, nonverbal signals are not always reliable (a person who avoids eye contact isn't necessarily trying to hide something, for example), and people vary widely in their ability to interpret signals correctly.[57]

In a face-to-face conversation, everything from your body language to your clothing to your eye movements can influence the messages and meanings the other party takes away from the exchange. During a phone call, the pitch, rate, and other qualities of your voice can send nonverbal signals. Even with written messages (both printed and digital), design and formatting choices send nonverbal signals, although the focus here is on interpersonal communication. Six types of signals are particularly important (see Figure 2.10):

Nonverbal signals include facial expressions; vocal characteristics; gestures, posture, and gait; personal appearance; touch; and use of time and space.

- **Facial expressions.** Your face is the primary vehicle for expressing your emotions because it can reveal both the type and the intensity of your feelings.[58] Facial expressions can also affect other people's emotions—a smile or frown, for instance, can trigger a similar response in anyone you are talking to.[59] Your eyes are especially effective for indicating attention and interest, influencing others, regulating interaction, and establishing dominance.[60]
- **Vocal characteristics.** Aspects of voice carry both intentional and unintentional messages. A speaker can intentionally control pitch, pace, and stress to convey a specific

Your entire physical being is a nonverbal transmitter:

- Face, particularly your mouth and eyes
- Voice and vocal characteristics
- Gesture and posture
- Personal appearance
- Touch
- Use of time and space



Figure 2.10 The Importance of Nonverbal Signals
You send nonverbal signals continuously via just about every aspect of your physical being.

message. For instance, compare "*What* are you doing?" and "What are *you* doing?" Unintentional vocal characteristics can convey happiness, surprise, fear, and other emotions (for example, fear often increases the pitch and pace of your speaking voice).

Subtleties in intonation or emphasis can completely alter the meaning of a spoken message.

- **Gesture and posture.** The way you position and move your body expresses both specific and general messages, some voluntary and some involuntary. Many gestures—a wave of the hand, for example—have specific and intentional meanings. Other types of body movement can express meanings that may be unintended. Slouching, leaning forward, fidgeting, and walking briskly are all unconscious signals that can reveal whether you feel confident or nervous, friendly or hostile, assertive or passive, powerful or powerless.
- **Personal appearance.** People respond to others on the basis of their physical appearance, sometimes fairly and other times unfairly. Although an individual's body type and facial features define appearance to a large degree, you can control grooming, clothing, accessories, piercings, tattoos, and hairstyle. To make a good impression, adopt the style of the people you want to impress. Employers differ widely in their expectations of personal appearance, so make sure you are aware of your company's dress code, if it has one.
- **Touch.** Touch is an important way to convey warmth, comfort, and reassurance—as well as control. Touch is so powerful, in fact, that it is governed by cultural customs that establish who can touch whom and how in various circumstances. Even within each culture's norms, however, individual attitudes toward touch vary widely. A manager might be comfortable using hugs to express support or congratulations, but his or her subordinates could interpret those hugs as a show of dominance or sexual interest.[61] In other words, touch is a complex subject. Other than handshakes, the best general advice is to avoid touching anyone under any circumstances in the workplace. If someone else takes the initiative, you can choose to reciprocate if you want, but *only* if you are comfortable doing so.

Touch is a powerful element of communication, but it can be misused and misunderstood; as a general rule for the workplace, avoid any touching other than handshakes.

- **Time and space.** Like touch, time and space can be used to assert authority, imply intimacy, and send other nonverbal messages. For instance, some people try to demonstrate their own importance or disregard for others by making other people wait; others show respect by being on time. Similarly, taking care not to invade private space, such as standing too close when talking, is a way to show respect for others. Keep in mind that expectations regarding time and space vary by culture.

USING NONVERBAL COMMUNICATION EFFECTIVELY

Paying attention to nonverbal cues will make you a better speaker and a better listener. When you're talking, be conscious of the nonverbal cues you are sending, and use them to reinforce your spoken message. For example, if you want to persuade someone to collaborate with you on a project, don't lean back in your chair with your arms crossed while making your pitch. An open and forward posture will reinforce your message of cooperation.

Make sure the nonverbal signals you send don't undermine your efforts to succeed on the job.

Also consider the nonverbal signals you send when you're not talking—the clothes you wear, the way you sit, the way you walk. Whether or not you think it is fair to be judged on superficial matters, the truth is that you are judged this way. Don't let careless choices or disrespectful habits undermine all the great work you're doing on the job. In addition, be mindful of how your dress and grooming choices affect your own attitude. If you believe that you've made the effort to look your best, you will feel more confident, and that confidence will manifest itself in a variety of positive nonverbal signals.[62]

When you listen, pay attention to the speaker's nonverbal cues. Do they amplify, obscure, or contradict the spoken words? Is the speaker intentionally using nonverbal signals to send you a message that he or she can't put into words? A thin, forced smile in response to "How did your meeting with the boss go?" probably says that it didn't go well but that the person isn't ready to talk about it. As you gain experience in the workplace, reflect on the conversations you have with managers, colleagues, and customers. Compare the verbal messages you receive with the nonverbal signals that accompany them. Over time, you'll develop a better sense of how the people around you use nonverbal signals.

Don't assume you can "read someone like a book," particularly if you don't know the person's normal behavioral patterns.

Be observant, but don't assume you can "read someone like a book," particularly if you don't know the person's normal behavioral patterns.[63] For example, contrary to popular belief, avoiding eye contact and covering one's face while talking are not reliable clues that someone is lying. Even when telling the truth, most people don't make uninterrupted eye contact with listeners, and various gestures such as touching one's face might be normal behavior for some people.[64] Moreover, these and other behaviors may be influenced by culture (in some cultures, sustained eye contact can be interpreted as a sign of disrespect) or might just be ways of coping with stressful situations.[65]

If something doesn't feel right, ask the speaker an honest and respectful question. Doing so may clear everything up, or it may uncover issues you need to explore further. See "Checklist: Improving Your Nonverbal Communication Skills" for a summary of key ideas regarding nonverbal skills.

CHECKLIST ✓ Improving Your Nonverbal Communication Skills

- Understand the roles that nonverbal signals play in communication—complementing verbal language by strengthening, weakening, or replacing words.
- Note that facial expressions (especially eye contact) can reveal the type and intensity of a speaker's feelings.
- Watch for cues from gestures and posture.
- Listen for vocal characteristics that can signal the emotions underlying the speaker's words.
- Recognize that listeners are influenced by physical appearance.
- As a general workplace rule, avoid any physical contact beyond handshakes; touch can convey positive attributes but can also be interpreted as a show of dominance or sexual interest.
- Pay attention to the use of time and space.

Developing Your Business Etiquette

6 LEARNING OBJECTIVE

Explain the importance of business etiquette, and identify five key areas in which good etiquette is essential.

Etiquette, the expected norms of behavior in any particular situation, is essential to every aspect of interpersonal communication and team collaboration.

You may have noticed a common thread running through this chapter on the topics of teamwork, collaboration, productive meetings, and effective listening: All these activities depend on mutual respect and consideration among all participants. Nobody wants to work with someone who is rude to colleagues or an embarrassment to the company. Moreover, shabby treatment of others in the workplace can be a huge drain on morale and productivity.[66]

A vital element of audience-centered communication is **etiquette**, the expected norms of polite behavior in any situation. Poor etiquette can drive away customers, investors, and other critical audiences—and it can limit your career potential. Unfortunately, rude behavior appears to be on the rise, so the issue is more important than ever.[67]



Figure 2.11 The Five Zones of Professional Etiquette
Professionals pay attention to their effect on other people in five areas: in the workplace, in social settings in which they are representing their firms, while online, while using the telephone, and while using mobile devices.

This section addresses some key etiquette points to remember in a variety of work and work-related settings (see Figure 2.11). Long lists of etiquette rules can be difficult to remember, but you can get by in almost every situation by remembering to be aware of your effect on others, treating everyone with respect, and keeping in mind that the impressions you leave behind can have a lasting effect on you and your company.

BUSINESS ETIQUETTE IN THE WORKPLACE

Workplace etiquette includes a variety of behaviors, habits, and aspects of nonverbal communication. Follow these tips to help ensure a pleasant and productive workplace:[68]

- Respect other people's time, such as showing up for work and meetings on time.
- Don't interrupt people in conversations or in meetings.
- Watch your language. You might be comfortable with profanity in casual conversation, but it is out of place in a professional environment.
- Pay close attention to cleanliness, and avoid using products with powerful scents. Many people are bothered by these products, and some are allergic to them.
- Avoid eating at your desk if possible, particularly in open-plan offices. Some foods have strong smells, and no one wants to listen to you eat.
- Keep the noise level down. This is a huge concern in open-plan workspaces, where people are separated only by short cubicle walls and sometimes not even that. Keep your voice down, avoid having meetings in your cubicle, and don't play music at a level that disrupts others. (Remember that you can bother others even if you're wearing earbuds or headphones.)
- Respect other people's personal space. Knock before entering offices, and don't enter someone's cubicle without being invited.
- Don't gossip. Not only is gossip a waste of time, it's often disrespectful to others.
- Don't come to work when you're sick.
- In general, avoid discussing religion, politics, or other potentially emotional issues, unless your company encourages such discussions.

Noise can be a big problem in today's open-plan offices, so take care to avoid disrupting others.

Avoid coming to work when you're sick.

Although it isn't always thought of as an element of etiquette, your personal appearance in the workplace sends a strong signal to managers, colleagues, and customers (see Figure 2.12 on the next page). This isn't a question of mindlessly conforming or surrendering your individuality; it's a question of showing respect for an organizational culture that is bigger than you.

Pay attention to the style of dress where you work, and adjust your style to match. Expectations for specific jobs, companies, and industries vary widely. Firms in the financial sector tend to be more formal than high-tech, creative, and industrial companies,

Pay attention to the style of dress where you work and adjust your style to match.



Paul Bradbury/OJO Images Ltd/Alamy Stock Photo

Figure 2.12 Showing Respect for Organizational Culture
The choices you make regarding personal appearance and behavior can send a strong signal to managers, colleagues, and customers regarding your level of respect for workplace norms.

for instance, and sales and executive positions usually involve more formal expectations than positions in engineering or manufacturing.

Work attire falls into four degrees of formality:
- Business formal
- Business professional
- Business casual
- Casual

You can view business style as four levels:[69]

- **Business formal.** This means tailored suits in conservative colors, with shoes, accessories, and grooming to match. This style is usually restricted only to the most formal occasions or among top-level executives and high-profile professionals.
- **Business professional.** This style is still based around suits or coordinated sets of jackets with skirts or trousers, but the overall vibe is slightly freer—and less expensive.
- **Business casual.** This is the style adopted in more relaxed offices in a variety of industries and professions. In general, it means slacks or skirts, with nice-looking button-up shirts, blouses, and sweaters.
- **Casual.** This category is perhaps the most difficult to pin down. In one company it might mean nice jeans and a button-up shirt, but in another it might be shorts, sandals, and tank tops.

In general, the trend in U.S. offices is toward casual, but don't overstep the boundaries in place at your specific office. Observe others, and don't be afraid to ask for advice. Many clothing stores, department stores, and online retailers such as Stitchfix (**www.stitchfix.com**) offer personal shopping guidance or style guides to help you select garments. If you're not sure, dress modestly and simply—earn a reputation for what you do, not for what you wear.

BUSINESS ETIQUETTE IN SOCIAL SETTINGS

Etiquette is particularly important when you represent your company in public.

From business lunches to industry conferences, you may be asked to represent your company in public. Make sure your appearance and actions are appropriate to the situation. Get to know the customs of other cultures when it comes to meeting new people. For example, in North America, a firm handshake is expected when two people meet, whereas a respectful bow of the head is more appropriate in Japan. If you are physically able, always stand when shaking someone's hand.

When introducing yourself, state your first and last name and include a brief description of your role in the company.

When introducing yourself, state your first and last name and include a brief description of your role in the company. When introducing two other people, give their first and last names clearly and then try to offer some information (perhaps a shared professional interest) to help the two people ease into a conversation.[70]

Generally speaking, introduce younger people to older people and lower-ranking employees or managers to higher-ranking managers.[71]

Business is often conducted over meals, and knowing the basics of dining etiquette will make you more effective in these situations.[72] Search online for "dining etiquette" to find helpful videos on this topic. And remember that business meals are a forum for business. Don't discuss politics, religion, or any other topic that's likely to stir up emotions. Don't complain about work, don't ask deeply personal questions, avoid profanity, and be careful with humor—a joke that entertains some people could easily offend others.

Receptions are a common part of industry conferences and other business events, and they are a great opportunity to meet new people and renew old acquaintances. Although receptions can be good networking opportunities, don't press your business card on everyone or "pitch" yourself or your company to everyone you meet. Also, help people who are looking to join conversations. If you see someone standing near a group you are part of, pause the conversation and introduce yourself to help the newcomer feel included.

At receptions and other social events, help others feel welcome by introducing yourself and inviting them to join conversations.

ONLINE ETIQUETTE

Digital media seem to be a breeding ground for poor etiquette that can harm companies and careers. Whenever you represent your company online, in any medium, you must adhere to a high standard of etiquette and respect for others. Follow these guidelines:[73]

When you represent your company online, officially or unofficially, you must adhere to a high standard of etiquette and respect for others.

- **Avoid personal attacks.** The disconnected feel of online communication can cause even level-headed people to lose their tempers.
- **Stay focused on the original topic.** If you want to change the subject of an online conversation, start a new message or thread.
- **Follow basic expectations of spelling, punctuation, and capitalization.** Sending careless, acronym-filled messages undermines your credibility.
- **Use virus protection and keep it up to date.** Sending or posting a file that contains a computer virus puts others at risk.
- **Watch your language and keep your emotions under control.** A single indiscretion could haunt you forever.

Keep your cool online and use professional language.

- **Avoid multitasking while using messaging or other tools.** You might think you're saving time by doing a dozen things at once, but you're probably making the other person wait while you bounce back and forth between tasks.
- **Don't waste others' time with sloppy, confusing, or incomplete messages.** Doing so is disrespectful.
- **Never assume you have privacy.** Assume that anything you type will be stored forever, could be forwarded to other people, and might be read by your boss or the company's security staff.

Anything you say online could be seen by people far beyond your immediate audience, including your boss or your company's security staff.

- **Be careful of online commenting mechanisms.** For example, many blogs and websites let you use your Facebook login to comment on articles. If your Facebook profile includes your job title and company name, those could show up along with your comment.
- **Respect boundaries of time and virtual space.** For instance, don't use colleagues' or employees' personal social media accounts as a venue for business discussions, and don't assume people are available to discuss work matters around the clock, even if you do find them online in the middle of the night.

Respect personal and professional boundaries when using Facebook and other social networking tools.

TELEPHONE ETIQUETTE

Here are some important tips for using phones at work (for etiquette points specifically about mobile devices, see the next section):[74]

Basic courtesy on the phone makes communication more efficient and more pleasant for everyone involved.

- **Be conscious of how your voice sounds.** Don't speak in a monotone; vary your pitch and inflections so people know you're interested. Slow down when conversing with people whose native language isn't the same as yours.
- **Be courteous when you call someone.** Identify yourself and your organization, briefly describe why you're calling, and ask if you've called at a good time.
- **Convey a positive, professional attitude when you answer the phone.** Answer promptly and with a smile so that you sound welcoming. Identify yourself and your

company (some companies have specific instructions for what to say when you answer). If you need to forward a call, put the caller on hold first and call the next person yourself to verify that he or she is available.

- **End calls with courtesy and clarity.** Close in a friendly, positive manner and double-check all vital information, such as meeting times and dates.
- **Use your own voicemail features to help callers.** Record a brief, professional-sounding outgoing message for regular use. When you will be away or unable to answer the phone for an extended period, record a temporary greeting that tells callers when you will respond to their messages. If you don't check your messages regularly or at all, disable your voicemail or use your outgoing message to tell callers you don't check it. Letting voicemail messages pile up without answering them is extremely thoughtless.
- **Be considerate when leaving voicemail messages.** Unless voicemail is the only choice, consider leaving a message through other means, such as text messaging or email. If you do leave a voicemail message, make it as brief as possible. Leave your name, number, reason for calling, and times you can be reached.

If you never or rarely check your voicemail, disable it or record an outgoing message advising callers to reach you another way.

MOBILE DEVICE ETIQUETTE

Your mobile device habits send a signal about the degree of respect you have for those around you.

Like every other aspect of communication, your mobile device habits say a lot about how much respect you have for the people around you. Avoid these disrespectful choices:[75]

- Using obnoxious or inappropriate ringtones
- Failing to mute your phone during meetings or other situations where it will interrupt people
- Talking loudly in open offices or public places
- Talking on your phone right next to someone else
- Making or taking personal calls at work
- Invading privacy by using your phone's camera without permission
- Taking or making calls in restrooms and other inappropriate places
- Texting during meals or while someone is talking to you
- Allowing incoming calls to interrupt meetings or discussions
- Using voice recognition to the extent that it disrupts others

MOBILE APP

Locale can "geofence" your smartphone, automatically changing settings based on your location—such as activating silent mode when you arrive at your office.

Virtual assistants and other mobile phone voice features can annoy and disrupt the workplace and social settings if not used with respect for others.

Virtual, voice-activated assistants raise another new etiquette dilemma. From doing simple web searches to dictating entire memos, these systems may be convenient for users, but they can create distractions and annoyances for other people.[76] As with other public behaviors, think about the effect you have on others before using these technologies.

Note that expectations and policies regarding mobile device use vary widely from company to company. At one extreme, venture capitalist Ben Horowitz fines his employees if they even look at a mobile device while an entrepreneur is pitching a business plan because he considers it disrespectful to people making presentations.[77] Not all bosses are quite so strict, but make sure you understand the situation in your workplace.

COMMUNICATION CHALLENGES AT Salesforce

You are a member of a cross-functional team at Salesforce. Apply what you have learned in this chapter to these two challenges.

INDIVIDUAL CHALLENGE: Your team is a hybrid of co-located and virtual; you and five other members work in the same office, while four more colleagues work at other Salesforce locations around the country. The team holds weekly meetings where members update each other on project status, brainstorm solutions to challenges that have come up during the previous week, and craft plans for upcoming projects. Your office has a sophisticated teleconferencing system with high-quality video links and collaboration tools such as file sharing and a virtual whiteboard that everyone can use to share ideas. The team is self-managed with no formal leader.

Over the past few weeks, you sense that one of your remote colleagues has been getting increasingly negative and critical toward you. He hasn't resorted to outright attacks on anything you say, but his tone toward you in these meetings seems to have grown dismissive or negative. Rather than complimenting your ideas and contributions as he often did in the past, he now either gives you the barest acknowledgment or even ignores you entirely.

In today's meeting, you suggested a clever way to cut three weeks from an upcoming project schedule. He spoke

immediately after you and didn't even acknowledge that you said anything. He addressed one of your local colleagues by name and completely changed the subject. His behavior is starting to affect your morale and confidence, and you've found yourself wanting to respond with the same degree of cool disregard. However, this just isn't your style, and you don't want to resort to negative behavior. How should you handle the situation?

TEAM CHALLENGE: A common dilemma in every form of collaborative writing is deciding how soon to share early drafts with your colleagues to get their feedback and contributions. Should you send out an unpolished rough draft for the team's input before investing a lot of time in polishing and formatting, or should you do a second or third draft to enhance readability—knowing the team might delete entire sections you've worked hard to polish?

In your current team, some of your colleagues to go into "grammar attack mode" whenever a rough draft appears. They often ignore the message and content altogether and instead focus on punctuation, grammar, and formatting concerns. With a small team of fellow students, draft some brief guidelines for collaborative writers, conveying these three points: (1) Punctuation, grammar, and formatting are indeed important, but worrying about them too early in the writing process can hamper the free exploration of ideas and information. (2) When reviewing early drafts, team members should make a conscious effort to look past the presentation and focus on the information. (3) Contributors who share rough drafts seeking input should make the pages at least minimally readable so that reviewers can focus on the content and ideas.

Key Terms

active listening Making a conscious effort to turn off filters and biases to truly hear and understand what someone is saying
collaboration Working together to meet complex challenges
constructive feedback Critique that focuses on the process and outcomes of communication, not on the people involved
content listening Listening to understand and retain the speaker's message
critical listening Listening to understand and evaluate the meaning of the speaker's message
cross-functional team A team that includes people from more than one department or functional area within the company
destructive feedback Criticism delivered with no guidance to stimulate improvement
empathic listening Listening to understand the speaker's feelings, needs, and wants so that you can appreciate his or her point of view
etiquette The expected norms of polite behavior in any situation
group dynamics Interactions and processes that take place among the members of a team
groupthink Situation in which peer pressure causes individual team members to withhold contrary or unpopular opinions
hidden agenda Private, counterproductive motives, such as a desire to take control of a group
minutes Written summary of the important information presented and the decisions made during a meeting
nonverbal communication Information sent and received, both intentionally and unintentionally, without using written or spoken language
norms Informal standards of conduct that group members share and that guide member behavior
parliamentary procedure A time-tested method for planning and running effective meetings; the best-known guide to this procedure is *Robert's Rules of Order*
participative management An effort to involve employees in a company's decision-making
task-oriented roles Productive team roles directed toward helping a team reach its goals
team A unit of two or more people who share a mission and the responsibility for working to achieve a common goal
team-maintenance roles Productive team roles directed toward helping everyone work well together
unified communication A single system of communication that integrates voice and video calling, voice and video conferencing, instant messaging, real-time collaboration software, and other capabilities
virtual meetings Meetings that take place online rather than in person
virtual team A team in which members work in at least two different locations and rely on technology to communicate and collaborate
wiki Special type of website that allows anyone with access to add new material and edit existing material

Summary of Learning Objectives

1 Describe the characteristics of effective teams, outline five steps for resolving team conflict, and offer advice on working in virtual teams. Effective teams tend to have (1) a shared sense of purpose and compatible values, (2) a clear and challenging goal, (3) a belief in the value of the team's efforts, (4) a well-balanced mix of participants, (5) a size that aligns well with the team's responsibilities, (6) an environment of psychological safety, (7) a willingness to put the team's needs first, and (8) open and honest communication.

To resolve conflict in teams

- Decide if the conflict is worth addressing
- Examine your own beliefs and behaviors to see if you are contributing to the problem
- Identify where the conflict truly originates
- Establish common ground
- Choose a strategy for resolving the differences (avoidance, accommodation, compromise, or collaboration)

To work successfully on a virtual team

- Keep the team as small as possible
- Use the best collaboration technology available
- Clarify the purpose of each tool
- Take special care with isolated members
- Don't rely solely on written communication

2 Offer guidelines for collaborative communication, explain what it means to give constructive feedback, and identify major collaboration technologies. Key guidelines for collaborative writing include

- Making sure the project goals are clear and agreed on
- Mapping out how the work will be done
- Structuring assignments so that each person can lend his or her greatest strengths
- Establishing frequent checkpoints
- Appreciating that people have different writing styles

Giving constructive feedback means focusing on the work and how it can be improved rather than on the person and any mistakes he or she may have made.

Major collaboration technologies include content management systems, wikis, shared online workspaces, social networks, workgroup messaging systems, and private networks (including intranets and extranets).

3 List the key steps needed to ensure productive meetings. The most important step in planning a meeting is to make sure that a meeting is necessary and is the best way to accomplish the given objective. If it is, proceed by identifying the purpose of the meeting, selecting the right mix of participants to accomplish the goal, choosing the venue and time carefully, and setting a clear agenda.

Once the meeting is under way, work to keep the discussion on track, follow agreed-on rules, encourage participation, participate actively yourself, don't interrupt, use mobile devices respectfully, and close the meeting effectively to make sure all decisions and action items are clearly understood.

4 Explain why listening is such a complex communication process, and describe three steps to becoming a better listener. Listening is vulnerable to all the potential barriers and breakdowns of communication in general plus several difficulties that are unique to listening: It is a real-time experience, spoken language is invisible, and listening requires the process of sound-to-language conversion. In addition, individuals can complicate listening through poor self-management, a lack of focus, ineffective listening style, internal and external barriers, and flawed recall.

5 Explain the importance of nonverbal communication, and identify six major categories of nonverbal expression. Nonverbal communication is important because nonverbal signals can strengthen, weaken, or even replace verbal messages. The major categories of nonverbal signals are facial expression, vocal characteristics, gestures and posture, personal appearance, touch, and the use of time and space.

6 Explain the importance of business etiquette, and identify five key areas in which good etiquette is essential. Attention to etiquette is essential to success in every form of business communication—so much so that etiquette is considered an important business skill. Poor etiquette can hinder team efforts, drain morale and productivity, drive away customers and investors, and limit your career potential. Five key areas in which good etiquette is essential are the workplace, social settings in which you represent your employer, online interactions in which you represent your employer, while using telephones, and when using mobile devices.

Test Your Knowledge

To review chapter content related to each question, refer to the indicated Learning Objective.

2-1. How can organizations and employees benefit from successful teamwork? [LO-1]
2-2. What is groupthink, and how can it affect an organization? [LO-1]
2-3. What are the primary challenges that virtual teams face? [LO-1]
2-4. How does constructive feedback differ from destructive feedback? [LO-2]
2-5. What is the value of a well-prepared meeting agenda? [LO-3]
2-6. Why is listening such a challenging communication process? [LO-4]
2-7. How does content listening differ from critical listening and empathic listening? [LO-4]
2-8. What are the five elements of active listening? [LO-4]
2-9. What are the six major categories of nonverbal communication? [LO-5]
2-10. Why do mobile devices present unique etiquette challenges? [LO-6]

Apply Your Knowledge

To review chapter content related to each question, refer to the indicated Learning Objective.

2-11. If a team doesn't "storm" when it starts working, is this necessarily cause for concern? Why or why not? [LO-1]
2-12. Your boss sent you a draft of a report intended for upper management with the request to "give it a once-over." What questions should you ask before starting the task? [LO-2]
2-13. You manage your company's software development lab, which has added several dozen new employees over the past year. One of the senior developers runs into you at lunch and starts to unload his frustrations about needing to get his own work done while being expected to mentor and train "a bunch of newbies." What style or styles of listening should you apply? Explain your answer. [LO-4]
2-14. Why do you think people are more likely to engage in rude behaviors during online communication than during in-person communication? [LO-6]
2-15. You're giving your first major presentation at your new job, and you notice at least half the people in the small conference room are looking at their mobile devices more than they are looking at you. How should you handle the situation? [LO-6]

Practice Your Skills

Message for Analysis

2-16. Planning Meetings [LO-3] A project leader has made notes about covering the following items at the quarterly budget meeting. Prepare a formal agenda by putting these items into a logical order and rewriting, where necessary, to give phrases a more consistent sound.

- Budget Committee Meeting to be held on December 12, 2021, at 9:30 a.m., and we have allotted one hour for the meeting
- I will call the meeting to order.
- Real estate director's report: A closer look at cost overruns on Greentree site. (10 minutes)
- The group will review and approve the minutes from last quarter's meeting. (5 minutes)
- I will ask the finance director to report on actual versus projected quarterly revenues and expenses. (15 minutes)
- I will distribute copies of the overall divisional budget and announce the date of the next budget meeting.
- Discussion: How can we do a better job of anticipating and preventing cost overruns? (20 minutes)
- Meeting will take place in Conference Room 3, with Cisco WebEx active for remote employees.
- What additional budget issues must be considered during this quarter?

Exercises

Each activity is labeled according to the primary skill or skills you will need to use. To review relevant chapter content, you can refer to the indicated Learning Objective. In some instances, supporting information will be found in another chapter, as indicated.

2-17. Collaboration: Working in Teams [LO-1], [LO-2] In teams assigned by your instructor, prepare a 10-minute presentation on the potential disadvantages of using social media for business communication. When the presentation is ready, discuss how effective the team was using the criteria of (a) having a clear objective and a shared sense of purpose, (b) communicating openly and honestly, (c) reaching decisions by consensus, (d) thinking creatively, and (e) knowing how to resolve conflict. Be prepared to discuss your findings with the rest of the class.

2-18. Collaboration: Working in Teams [LO-1] In teams assigned by your instructor, imagine that you have been given the opportunity to make a presentation to your college's administration offering your input on the most important change the college could make to improve student success. In this exercise, you and your teammates will hold a meeting to (a) decide which change to propose and then (b) outline a 10-minute presentation describing the change and its potential impact. This meeting will take place online using teleconferencing tools, with everyone on your team in different locations. Visit the Zoom website at **www.zoom.us/signup** and sign up for a free account. Conduct the meeting, and then be prepared to discuss this virtual team experience with the rest of the class.

2-19. Collaboration: Collaborating on Writing Projects; Media Skills: Blogging [LO-2] In this project you will conduct research on your own and then merge your results with those of the rest of your team. Search Twitter for messages on the subject of workplace safety. (You can use Twitter's advanced search function or use the "twitter.com" site qualifier on a regular search engine.) Compile at least five general safety tips that apply to any office setting, and then meet with your team to select the five best tips from all those the team has collected. Collaborate on a blog post that lists the team's top five tips.

2-20. Collaboration: Using Collaboration Technologies [LO-2] In a team assigned by your instructor, use a free cloud-based collaborating writing tool such as Google Docs or Zoho (free for personal use) to collaborate on a set of directions that out-of-town visitors could use to reach a specific point on your campus, such as a stadium or dorm. The team should choose the location and the mode(s) of transportation involved. Be creative—brainstorm the best ways to guide first-time visitors to the selected location using all the media at your disposal.

2-21. Communication Etiquette: Etiquette in the Workplace, Participating in Meetings [LO-3], [LO-6] In group meetings, some of your colleagues have a habit of interrupting and arguing with the speaker, taking credit for ideas that aren't theirs, and shooting down ideas they don't agree with. As the newest person in the group, you're not sure if this is accepted behavior in this company, but it concerns you both personally and professionally. Should you go with the flow and adopt their behavior or stick with your own communication style, even though you might get lost in the noise? In a two-paragraph email message or post for your class blog, explain the pros and cons of both approaches.

2-22. Collaboration: Participating in Meetings [LO-3] With a classmate, attend a local community or campus meeting where you can observe a group discussion, vote, or take other group action. Take notes individually during the meeting and, afterward, work together to answer the following questions.

a. What is your evaluation of this meeting? In your answer, consider (1) the leader's ability to clearly articulate the meeting's goals, (2) the leader's ability to engage members in a meaningful discussion, (3) the group's dynamics, and (4) the group's listening skills.

b. How did group members make decisions? Did they vote? Did they reach decisions by consensus? Did those with dissenting opinions get an opportunity to voice their objections?

c. How well did the individual participants listen? How could you tell?

d. Did any participants change their expressed views or their votes during the meeting? Why might that have happened?

e. Did you observe any of the communication barriers discussed in Chapter 1? Identify them.

f. Compare the notes you took during the meeting with those of your classmate. What differences do you notice? How do you account for these differences?

2-23. **Collaboration: Leading Meetings [LO-3], Chapter 3** Every month, each employee in your department is expected to give a brief oral presentation on the status of his or her project. However, your department has recently hired an employee who has a severe speech impediment that prevents people from understanding much of what he says. As the department manager, how will you resolve this dilemma? Please explain.

2-24. **Interpersonal Communication: Listening Actively [LO-4]** For the next several days, take notes on your listening performance during at least a half-dozen situations in class, during social activities, and at work, if applicable. Referring to the traits of effective listeners in Table 2.6, rate yourself on these positive listening habits using *always, frequently, occasionally*, or *never*. In a report no longer than one page, summarize your analysis and identify specific areas in which you can improve your listening skills.

2-25. **Nonverbal Communication: Analyzing Nonverbal Signals [LO-5]** Select a business letter and envelope you have received at work or home. Analyze their appearance. What nonverbal messages do they send? Are these messages consistent with the content of the letter? If not, what could the sender have done to make the nonverbal communication consistent with the verbal communication? Summarize your findings in a post on your class blog or in an email message to your instructor.

2.26. **Communication Etiquette: Etiquette in the Workplace [LO-6]** As the regional manager of an international accounting firm, you place high priority on professional etiquette. Not only does it communicate respect to your clients, it also instills confidence in your firm by showing that you and your staff are aware of and able to meet the expectations of almost any audience. Earlier today you took four new employees to lunch with an important client. You've done this for years, and it's usually an upbeat experience for everyone, but today's lunch was a disaster. One of the employees made not one, not two, but three calls on his mobile phone during lunch. Another interrupted the client several times and even got into a mild argument. The third employee kept telling sarcastic jokes about politics, making everyone at the table uncomfortable. And the fourth showed up dressed like she was expecting to bale hay or work in a coal mine, not have a business lunch in a posh restaurant. You've already called the client to apologize, but now you need to coach these employees on proper business etiquette. Draft a brief memo to these employees, explaining why etiquette is so important to the company's success—and to their individual careers.

Expand Your Skills

Critique the Professionals

Celebrities can learn from successful businesses when it comes to managing their careers, but businesses can learn from successful celebrities, too—particularly when it comes to building communities online using social media. Locate three celebrities (musicians, actors, authors, or athletes) who have sizable fan bases on Facebook and analyze how they use the social network. Using whatever medium your instructor requests, write a brief analysis (no more than one page) of the lessons, positive or negative, that a business could learn from these celebrities. Be sure to cite specific elements from the Facebook pages you've chosen, and if you think any of the celebrities have made mistakes in their use of Facebook, describe those as well.

Sharpening Your Career Skills Online

Find a website, video, article, podcast, or presentation that offers advice on improving your active listening skills in business situations. Write a brief email message to your instructor, describing the item you found and summarizing the career skills information you learned from it.

Build Your Career

In the Build Your Career activity in Chapter 1, you started developing your job campaign by brainstorming what you would like to do in your career. Now it's time to tally up what you can offer an employer. If you haven't already, read "What Do You Have to Offer?" in the Prologue. Follow the guidance in that section and create two lists that you can review and update as you complete your college career and begin compiling your résumé, LinkedIn profile, and other employment documents. The first is a list of accomplishments that you are proud of and any academic, work, and general life experiences that were satisfying to you. The second is a list of the skills, knowledge, and personal characteristics that helped you reach those accomplishments or enjoy those experiences.

As you add to the lists over time, the first list will show a pattern of *what* you are capable of, and the second will provide the evidence of *how* you can do those things. Whenever you complete a college course, a volunteer project, or a work assignment, look back on the experience and see what you can add to one or both lists. When it's time to start applying and interviewing for your first post-college job, the lists will provide the evidence that you are ready to tackle the next exciting challenge in your career.

Five-Minute Guide to Better Business Meetings

Review these five points whenever you are thinking about hosting a business meeting.

00:01

What is the purpose of this meeting?

1. Do you want to exchange information, reach a decision, or collaborate on a problem or an opportunity?
2. Describe the best possible outcome of the meeting; use this description to plan the agenda.
3. If you can't describe the purpose of meeting in a single sentence, you need to refine your plan before you move forward.

00:02

Who should attend?

1. If you can control the attendee list, invite everyone who really needs to be involved, and don't invite anyone who doesn't.
2. Meetings with more than 10 or 12 people can become unmanageable if everyone is expected to participate in the discussion and decision-making.

00:03

Can you configure the meeting space?

1. Conference room layout is ideal for small meetings and working sessions, and it works for small presentations as well.
2. The U-shape is ideal for mid-sized meetings, working sessions, and presentations. It promotes speaker interaction and supports conversation among attendees.
3. Theater/auditorium style is best for large audiences, but it limits interaction and makes it difficult for audiences to work with documents or devices unless chairs include desk surfaces.
4. Classroom style, with attendees sitting at tables facing the speaker, is a good alternative to theater/auditorium style when you want to give participants more work surface.
5. The breakout session format with small teams around individual tables is good for working meetings or seminars in which you ask the audience to split into groups.

00:04

Prepare the agenda and plan ahead to record minutes

1. A good agenda answers three questions:
   a. What do we need to do in this meeting to accomplish our goals?
   b. What issues will be of greatest importance to all participants?
   c. What information must be available to discuss these issues?
2. Consider creating a simpler presentation agenda in addition to the detailed planning agenda.
3. Prepare any prestudy materials that attendees should read in order to be ready to participate.
4. Make provisions for someone to take notes and distribute minutes after the meeting.

00:05

Tips for planning and leading virtual meetings

1. Make sure the meeting has a well-defined task, so that it steadily moves toward a goal.
2. Provide prestudy materials so everyone is up to speed before the meeting starts.
3. Assign people to specific roles, such as a technical specialist to help with connectivity problems and someone to record the minutes.
4. If the participants don't know each other, introduce them or ask them to introduce themselves.
5. As you work through each agenda item, summarize what has been discussed and ask if anyone has questions or comments.
6. Periodically check in with each person, if feasible, to make sure there are no lingering questions or points of disagreement.

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3 Communication Challenges in a Diverse, Global Marketplace

LEARNING OBJECTIVES

After studying this chapter, you will be able to

1. Discuss the opportunities and challenges of intercultural communication.
2. Define cultural competency, and explain the influence of culture on business communication.
3. Explain the importance of recognizing cultural variations, and list eight key dimensions of cultural diversity.
4. List four general guidelines for adapting to any business culture.
5. Identify six steps you can take to improve your intercultural communication skills.

COMMUNICATION CLOSE-UP AT Kaiser Permanente

healthy.kaiserpermanente.org

Delivering quality health care is difficult enough, given the complexities of technology, government regulations, evolving scientific and medical understanding, and the variability of human performance. It gets even more daunting when you add the challenges of communication among medical staff and between patients and their caregivers, which often takes place under stressful circumstances. Those communication efforts are challenging enough in an environment where everyone speaks the same language and feels at home in a single cultural context—but they're infinitely more complex in the United States, whose residents identify with dozens of different cultures and speak several hundred languages.

The Oakland-based health-care system Kaiser Permanente has been embracing the challenges and opportunities of diversity since its founding in 1945. It made a strong statement with its first hospital when it refused to follow the then-common practice of segregating patients by race. Now, as the largest not-for-profit health system in the United States, Kaiser has a client base that includes 12 million members from over 100 distinct cultures.

At the core of Kaiser's approach is *culturally competent care*, which it defines as "health care that acknowledges cultural diversity in the clinical setting, respects members' beliefs and practices, and ensures that cultural needs are considered and respected at every point of contact." These priorities are woven into Kaiser's organizational culture, structure, and business practices.

Delivering this standard of care requires a mix of skills and knowledge that range from an awareness of medical issues of concern to specific cultures to language fluency (and translation skills in more than 100 languages) to the awareness needed to handle cultural traditions and values in a sensitive manner. Kaiser's Centers of Excellence in Culturally Competent Care at facilities around the country are a good example of the extent the company goes to in order to serve its diverse clientele. Each



Mario Anzuoni/Reuters

Kaiser Permanente CEO Bernard J. Tyson believes a culturally competent workforce is essential to the health provider's aim of serving the diverse U.S. population.

center focuses on one or more cultures prominent in a given locale, with a particular emphasis on improving care outcomes for population segments that have historically been underserved.

Kaiser believes that effectively serving a diverse client base requires an equally diverse staff. As chairman and CEO Bernard J. Tyson explains, "The rich diversity of our organization reflects the diversity of the people we serve each and every day." Nearly half of the executive team members are women, for example, and people of color make up nearly 60 percent of the company's workforce.

In addition to helping Kaiser communicate more effectively with its customers, the strategic emphasis on diversity and inclusion is good for business. Its target market segments also happen to be among the country's fastest-growing demographic groups, and Kaiser's ability to connect with these audiences gives it an important competitive advantage.[1]

Understanding the Opportunities and Challenges of Communication in a Diverse World

1 LEARNING OBJECTIVE
Discuss the opportunities and challenges of intercultural communication.

Kaiser Permanente (profiled in the chapter-opening Close-Up) illustrates the opportunities and the challenges for business professionals who know how to communicate with diverse audiences. Although the concept is often framed in terms of race or gender, a broader and more useful definition of **diversity** includes "all the characteristics and experiences that define each of us as individuals."[2] Some aspects of diversity, such as race and age, are inherent. Others, such as work history, language, religion, cultural immersion, and education, are acquired through life experience.[3] Together, these characteristics and experiences can have a profound effect on the way businesspeople communicate.

Diversity includes all the characteristics that define people as individuals.

Intercultural communication is the process of sending and receiving messages between people whose cultural backgrounds could lead them to interpret verbal and nonverbal signs differently. Every attempt to send and receive messages is influenced by culture, so to communicate successfully, you need a basic grasp of the cultural differences you may encounter and how you should handle them. Efforts to recognize and bridge cultural differences will open up business opportunities throughout the world and maximize the contributions of all the employees in a diverse workforce.

Intercultural communication is the process of sending and receiving messages between people whose cultural backgrounds could lead them to interpret verbal and nonverbal signs differently.

THE OPPORTUNITIES IN A GLOBAL MARKETPLACE

You will communicate with people from many other cultures throughout your career.

Chances are good that you'll be working across international borders sometime in your career. Thanks to communication and transportation technologies, natural boundaries and national borders are no longer the impassable barriers they once were. Local markets are opening to worldwide competition as businesses of all sizes look for new growth opportunities outside their own countries. Thousands of U.S. businesses depend on exports for significant portions of their revenues. If you work in one of these companies, you may well be called on to visit or at least communicate with a wide variety of people who speak languages other than English and who live in cultures quite different from what you're used to.

THE ADVANTAGES OF A DIVERSE WORKFORCE

The diversity of today's workforce brings distinct advantages to businesses:

- A broader range of views and ideas
- A better understanding of diverse, fragmented markets
- A broader pool of talent from which to recruit

Even if you never visit another country or transact business on a global scale, you will interact with colleagues from a variety of cultures, with a wide range of characteristics and life experiences. Over the past few decades, many innovative companies have changed the way they approach diversity, from seeing it as a legal requirement (providing equal opportunities for all) to seeing it as a strategic opportunity. Smart business leaders recognize the competitive advantages of a diverse workforce that offers a broader spectrum of viewpoints and ideas, helps businesses understand and identify with diverse markets, and enables companies to benefit from a wider range of employee talents.[4] Numerous studies show a correlation between company performance and workforce diversity.[5]

THE CHALLENGES OF INTERCULTURAL COMMUNICATION

A company's cultural diversity affects how its business messages are conceived, composed, delivered, received, and interpreted.

Today's increasingly diverse workforce encompasses a wide range of skills, traditions, backgrounds, experiences, outlooks, and attitudes toward work—all of which can affect communication in the workplace. Supervisors face the challenge of connecting with these diverse employees, motivating them, and fostering cooperation and harmony among them. Teams face the challenge of working together closely, and companies are challenged to coexist peacefully with business partners and with the community as a whole.

Culture influences everything about communication, including
- Language
- Nonverbal signals
- Word meaning
- Time and space issues
- Rules of human relationships

The interaction of culture and communication is so pervasive that separating the two is virtually impossible. The way you communicate is deeply influenced by the culture in which you were raised. The meaning of words, the significance of gestures, the importance of time and space, the rules of human relationships—these and many other aspects of communication are defined by culture. To a large degree, your culture influences the way you think, which naturally affects the way you communicate as both a sender and a receiver.[6] Intercultural communication is much more complicated than simply matching language between sender and receiver; it goes beyond words to beliefs, values, and emotions.

Your instinct is to encode messages using the assumptions of *your* culture, but members of your audience decode messages according to the assumptions of *their* culture.

Elements of human diversity can affect communication at every stage of the communication process, from the ideas a person deems important enough to share to the habits and expectations of giving feedback. In particular, your instinct is to encode messages using the assumptions of *your* culture. However, members of your audience decode your messages according to the assumptions of *their* culture. Thinking back to Figure 1.6's illustration of how shared experience affects understanding, you can see how the further two cultures are apart, the more challenging it can be to transfer messages and meaning successfully.

Throughout this chapter, you'll see examples of how communication styles and habits vary from one culture to another. These examples are intended to illustrate the major themes of intercultural communication, not to give an exhaustive list of styles and habits of any particular culture. With an understanding of these major themes, you'll be prepared to explore the specifics of any culture.

Developing Cultural Competency

2 LEARNING OBJECTIVE
Define cultural competency, and explain the influence of culture on business communication.

Cultural competency includes appreciation for cultural differences that affect communication and the ability to adjust one's communication style to match the situation.

Cultural competency includes an appreciation for cultural differences that affect communication and the ability to adjust one's communication style to ensure that efforts to send and receive messages across cultural boundaries are successful. In other words, it requires a combination of attitude, knowledge, and skills.[7]

The good news is that you're already an expert in culture, at least in the culture in which you grew up. You understand how your society works, how people are expected to communicate, what common gestures and facial expressions mean, and so on. The bad news is that because you're such an expert in your own culture, your communication is largely automatic; that is, you rarely stop to think about the communication rules you're following. An important step toward successful intercultural communication is becoming more aware of these rules and of the way they influence your communication.

UNDERSTANDING THE CONCEPT OF CULTURE

Culture is a shared system of symbols, beliefs, attitudes, values, expectations, and behavior norms.

Culture is a shared system of symbols, beliefs, attitudes, values, expectations, and norms for behavior. All people belong to multiple cultures that influence their beliefs and behaviors to varying degrees. In addition to the culture you share with all the people who live in your own country, you belong to other cultural groups, sometimes referred to as *subcultures*, including an ethnic group, possibly a religious group, maybe a political party, and perhaps a profession that has its own special language and customs. With its large population and long history of immigration, the United States is home to a vast array of cultures.

Members of every culture tend to have similar assumptions about how people should think, behave, and communicate.

Members of a given culture tend to have similar assumptions about how people should think, behave, and communicate, and they tend to act on those assumptions in much the same way. Cultures can vary in their rate of change, degree of complexity, and tolerance toward outsiders. These differences affect the level of trust and openness you can achieve when communicating with people of other cultures.

You learn culture both directly (by being instructed) and indirectly (by observing others).

People learn culture directly and indirectly from other members of their group. As you grow up in a culture, you are taught by the group's members who you are and how best to function in that culture. Sometimes you are explicitly told which behaviors are acceptable; at other times you learn by observing which values work best in a particular group. Over time, the influences of that culture tend to become *automatic*, in that you follow them without thinking about them.

Cultures tend to offer views of life that are both *coherent* (internally logical) and *complete* (able to answer all of life's big questions).

In addition to being automatic, culture tends to be *coherent*; that is, a culture appears to be fairly logical and consistent when viewed from the inside. Certain norms within a culture may not make sense to someone outside the culture, but they probably make sense to those inside. Such coherence generally helps a culture function more smoothly internally, but it can create disharmony between cultures that don't view the world in the same way.

Finally, cultures tend to be complete in the sense that they provide their members with most of the answers to life's big questions. This idea of completeness dulls or even suppresses curiosity about life in other cultures. Not surprisingly, such completeness can complicate communication with other cultures.[8]

OVERCOMING ETHNOCENTRISM AND STEREOTYPING

Ethnocentrism is the tendency to judge all other groups according to the standards, behaviors, and customs of one's own group.

Ethnocentrism is the tendency to judge other groups according to the standards, behaviors, and customs of one's own group. Given the automatic influence of one's own culture, when people compare their culture to others, they often conclude that their own is superior.[9] An even more extreme reaction is **xenophobia**, a fear of strangers and foreigners. Clearly, businesspeople who take these views are not likely to communicate successfully across cultures.

Xenophobia is a fear of strangers and foreigners.

Stereotyping is assigning generalized attributes to an individual on the basis of membership in a particular group.

Distorted views also result from **stereotyping**, which is assigning a wide range of generalized attributes to an individual on the basis of membership in a particular culture or social group. For instance, assuming that an older colleague will be out of touch with the youth market or that a younger colleague can't be an inspiring leader would be stereotyping based on age groups.

Cultural pluralism is the acceptance of multiple cultures on their own terms.

Those who want to show respect for others and to communicate effectively in business need to adopt a more positive viewpoint, in the form of **cultural pluralism**—the practice of accepting multiple cultures on their own terms. A few simple habits can help:

You can avoid ethnocentrism and stereotyping by avoiding assumptions, withholding judgment, and accepting differences.

- **Avoid assumptions.** Don't assume that others will act the same way you do, use language and symbols the same way you do, or even operate from the same values and beliefs. In other words, you need to consciously resist the automatic impulses from your own culture.
- **Avoid judgments.** When people act differently, don't conclude that they are in error or that their way is invalid or inferior. As with assumptions, avoiding judgment requires conscious effort, such as not letting someone's appearance or accent influence your perceptions.[10]
- **Acknowledge distinctions.** Don't ignore the differences between another person's culture and your own.

Unfortunately, overcoming ethnocentrism and stereotyping is not a simple task, even for people who are highly motivated to do so. Moreover, research suggests that people often have beliefs and biases they're not even aware of—and that may even conflict with the beliefs they *think* they have.[11]

3 LEARNING OBJECTIVE

Explain the importance of recognizing cultural variations, and list eight key dimensions of cultural diversity.

Recognizing Variations in a Diverse World

You can begin to learn how people in other cultures want to be treated by recognizing and accommodating eight main types of cultural differences: contextual, legal and ethical, social, nonverbal, age, gender, religious, and ability (see Figure 3.1).

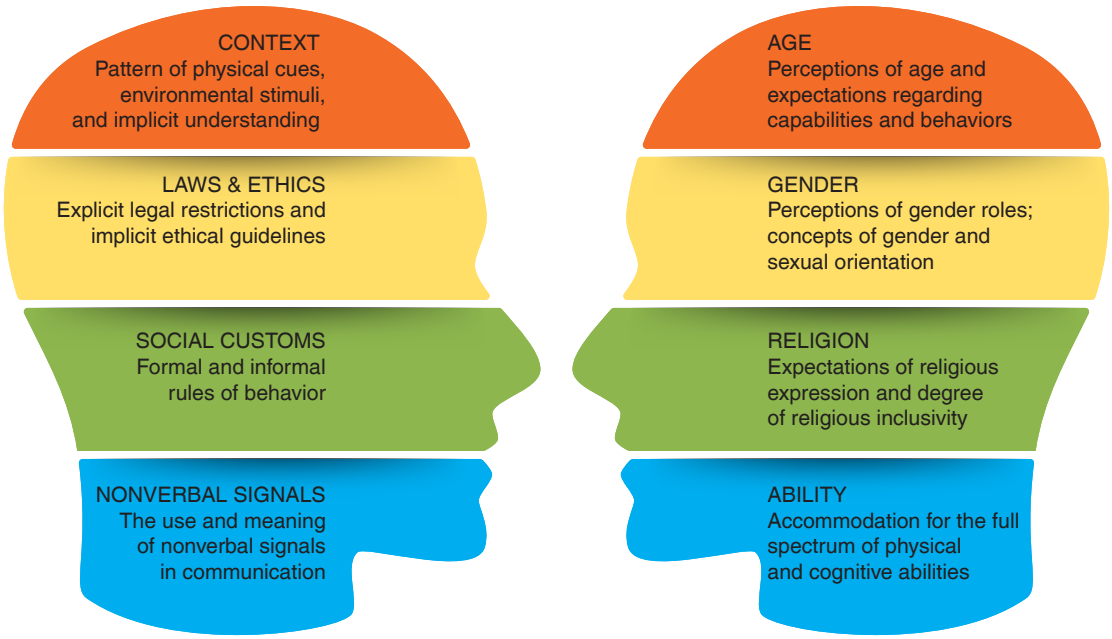


Figure 3.1 Major Dimensions of Cultural Diversity
Here are eight of the most significant variables that define any culture and can create differences between cultures.

CONTEXTUAL DIFFERENCES

Every attempt at communication occurs within a **cultural context**, which is the pattern of physical cues, environmental stimuli, and implicit understanding that convey meaning between two members of the same culture. Cultures around the world vary widely in the role that context plays in communication.

Cultural context is the pattern of physical cues, environmental stimuli, and implicit understanding that conveys meaning between members of the same culture.

In a **high-context culture**, people rely less on verbal communication and more on the context of nonverbal actions and environmental setting to convey meaning. Moreover, communication can be as much about building relationships as it can be about exchanging information. Countries often identified as having high-context cultures include China, Japan, and many Arab nations.[12]

A *high-context culture* relies heavily on nonverbal actions and environmental setting to convey meaning.

In a **low-context culture** such as those in United States, Germany, and Switzerland, people rely more on verbal communication and less on circumstances and cues to convey meaning. In such cultures, rules and expectations are usually spelled out through explicit statements. And in contrast to high-context cultures, in these cultures communication tends to emphasize exchanging information over building relationships.[13]

A *low-context culture* relies more on explicit verbal communication.

Contextual differences are apparent in the way businesspeople approach situations such as decision-making, problem solving, negotiating, interacting among levels in the organizational hierarchy, and socializing outside the workplace.[14] For instance, in low-context cultures, businesspeople tend to focus on the results of the decisions they face, a reflection of the cultural emphasis on logic and progress (for example, "Will this be good for our company? For my career?"). In comparison, high-context cultures emphasize the means or the method by which a decision will be made. Building or protecting relationships can be as important as the facts and information used in making the decisions.[15] Consequently, negotiators working on business deals in such cultures may spend most of their time together building relationships rather than hammering out contractual details.

Contextual differences influence the way businesspeople approach situations such as decision-making, problem solving, and negotiating.

The distinctions between high and low context are generalizations, of course, but they are important to keep in mind as guidelines. Communication tactics that work well in a high-context culture may backfire in a low-context culture, and vice versa.

LEGAL AND ETHICAL DIFFERENCES

Cultural context influences legal and ethical behavior, which in turn can affect communication. For example, the meaning of business contracts can vary from culture to culture. Whereas a manager from a U.S. company would tend to view a signed contract as the

Cultural context influences legal and ethical behavior, which in turn can affect communication.

end of the negotiating process, with all the details resolved, his or her counterpart in many Asian cultures might view the contract as more fluid, and continued renegotiation is common.[16]

As you conduct business around the world, you'll find that both legal systems and ethical standards differ from culture to culture. An enduring dilemma for many companies, for example, is the question of making payments to government officials to secure contracts in some countries. While the practice is so common in some locations that it's considered a standard way of doing business, paying bribes is generally illegal for U.S. companies under the Foreign Corrupt Practices Act.[17]

SOCIAL NORMS AND CUSTOMS

The nature of social behavior varies among cultures, sometimes dramatically. Some behavioral rules are formal and specifically articulated (table manners are a good example), whereas others are informal and learned over time (such as the comfortable distance to stand from a colleague during a discussion). The combination of formal and informal rules influences the overall behavior of most people in a society most of the time. Social norms can vary from culture to culture in the following areas:

- **Attitudes toward work and success.** In the United States, for instance, a widespread view is that material comfort earned by individual effort is a sign of superiority and that people who work hard are better than those who don't.
- **Roles and status.** Culture influences the roles people play, including who communicates with whom, what they communicate, and in what way. Countries and cultures vary widely regarding social status, both in the perceptions of different social classes and the respect one is expected to show to those of a different class. Attitudes toward the role of women in business also vary considerably from country to country.[18]

Respect and rank are reflected differently from culture to culture in the way people are addressed and in their working environment.

- **Use of manners.** What is polite in one culture may be considered rude in another. For instance, asking a colleague "How was your weekend?" is a common way of making small talk in the United States, but the question sounds intrusive to people in cultures in which business and private lives are seen as separate spheres.

The rules of polite behavior vary from country to country.

- **Concepts of time.** People in low-context cultures see time as a way to plan the business day efficiently, often focusing on only one task during each scheduled period and viewing time as a limited resource. However, people from high-context cultures often see time as more flexible. Meeting a deadline is less important than building a business relationship.[19]

Attitudes toward time, such as strict adherence to meeting schedules, can vary throughout the world.

- **Future orientation.** Successful companies tend to have a strong *future orientation*, planning for and investing in the future, but national cultures around the world vary widely in this viewpoint. Some societies encourage a long-term outlook that emphasizes planning and investing—making sacrifices in the short term for the promise of better outcomes in the future. Others are oriented more toward the present, even to the point of viewing the future as hopelessly remote and not worth planning for.[20]
- **Openness and inclusiveness.** At the national level as well as within smaller groups, cultures vary on how open they are to accepting people from other cultures and people who don't appear to fit the prevailing norms within the culture. An unwillingness to accommodate others can range from outright exclusion to subtle pressures to conform to majority expectations.

Cultures around the world exhibit varying degrees of openness toward both outsiders and people whose personal identities don't align with prevailing social norms.

These social customs affect how people behave in the workplace, and differences can create communication problems. For instance, the French cosmetics company L'Oréal trains its global workforce in a standardized approach to conflict management that encourages employees to express disagreement and share competing ideas. In the beginning, this style felt unnatural for its Chinese employees, whose culture discouraged open debate, but they grew to appreciate the advantages of the approach.[21]

Understanding the nuances of social customs takes time and effort, but most businesspeople are happy to explain the habits and expectations of their culture. Plus, they will view your curiosity as a sign of respect.

NONVERBAL COMMUNICATION

The meaning of nonverbal signals can vary widely from culture to culture, so you can't rely on assumptions.

As Chapter 2 notes, nonverbal communication can be a helpful guide to determining the meaning of a message—but this holds true only if the sender and receiver assign the same meaning to nonverbal signals. For instance, the simplest hand gestures have different meanings in different cultures. Gestures you may have been using in the United States all your life, such as giving someone a thumbs up to indicate agreement or approval, can have different and sometimes extremely rude meanings in other cultures.[22] If you will be visiting another country or hosting a visitor to your country, do some quick research about acceptable gestures to avoid embarrassing mistakes.

When you have the opportunity to interact with people in another culture, the best advice is to study the culture in advance and then observe the way people behave in the following areas:

Cultural norms influence the use of many nonverbal signals and behaviors:
- How people greet one another
- Respect for personal space
- Habits of touching
- Facial expressions
- Eye contact
- Posture
- Degree of formality

- **Greetings.** Do people shake hands, bow, or kiss lightly (on one side of the face or both)? Do people shake hands only when first introduced or every time they say hello or goodbye?
- **Personal space.** When people are conversing, do they stand closer together or farther away than you are accustomed to?
- **Touching.** Do people touch each other on the arm to emphasize a point or slap each other on the back to show congratulations? Or do they refrain from touching altogether? Some cultures are much more touch-oriented than others but, as always, you must be careful to avoid forms of touch that can be misinterpreted as domineering or sexual in nature.
- **Facial expressions.** Do people smile at strangers, for example? This is common behavior in the United States, but it is not universal.
- **Eye contact.** Do people make frequent eye contact or avoid it? Frequent eye contact is often taken as a sign of honesty and openness in the United States, but in other cultures it can be a sign of aggressiveness or disrespect.
- **Posture.** Do people slouch and relax in the office and in public, or do they sit up and stand up straight?
- **Formality.** In general, does the culture seem more or less formal than yours?

Following the lead of people who grew up in the culture is a great way to learn and a good way to show respect as well.

AGE DIFFERENCES

Every generation has been shaped by dramatically different world events, social trends, and technological advances.

The multiple generations within a culture present another dimension of diversity. Today's workplaces can have three, four, or even five generations working side by side. Each has been shaped by dramatically different world events, social trends, and technological advances, so it is not surprising that they often have different values, expectations, and communication habits. Throw in the human tendencies to resist change and to assume that whatever way one is doing something must be the best way to do it, and you have a recipe for conflict. Moreover, generations in a workplace sometimes feel they are competing for jobs, resources, influence, and control. The result can be tension, mistrust, and communication breakdowns.

Lumping people into generations is an imprecise science at best, but it helps to know the labels commonly applied to various age groups. Be aware, however, that there are no official labels or year ranges for these generations. Over time, these have come into general use by population researchers and the news media. The only one of these group labels used by the U.S. Census Bureau, for instance, is baby boomers. Here are the labels and birth years used by the Pew Research Center, a leading independent research organization. (Pew is waiting for a consensus to emerge regarding a label for the post-millennial generation.)[23]

- **The Silent Generation (born 1928–1945).** People in this group are beyond what was once considered the traditional retirement age of 65, but a small number want or need to continue working.
- **Baby Boomers (1946–1964).** This generation, which got its name from the population boom in the years following World War II, is gradually moving into

retirement. However, many baby boomers will continue to work beyond age 65—and hold on to many top management positions that younger employees would like to move into.

- **Generation X (1965–1980).** This group, the second-largest generation in the workforce, sometimes feels caught between the large mass of older baby boomers and the younger millennial generation. As Generation X takes over corporate leadership, it is managing in a vastly different business landscape—one in which virtual organizations and networks of independent contractors replace some of the hierarchy inherited from the baby boomers.
- **Millennials (1981–1996).** This largest generation in the workforce, sometimes referred to as Generation Y, is noted for its entrepreneurial instincts and desire for a more open and sociable workplace than many of their older peers.
- **"Post-Millennials" (1997–).** This group, sometimes known as Generation Z, is just beginning to move into the workforce.

These brief summaries can hardly do justice to entire generations of workers, but they give you some idea of the different generational perspectives and the potential for communication problems. As with all cultural conflicts, successful communication starts with recognizing and understanding both differences and similarities. Beneath the superficial differences in technology usage and other factors, various generations are often more alike than they are different.

Commonly defined generations such as millennials or baby boomers represent tens of millions of people in the United States alone, so don't interpret broad statements about any generation as universal truths.

When you hear statements about the beliefs and behaviors of a particular generation, always bear in mind that these are broad generalities. For example, more than 70 million people in the United States alone fall in the millennial designation, and any group that large is bound to have a wide range of beliefs and behaviors. In addition, the age ranges are not hard-and-fast boundaries in terms of human behavior. The first "Gen Xer" (born on January 1, 1965) doesn't automatically think and behave differently than the last baby boomer (born one day earlier on December 31, 1964).

In the workplace and in your communication activities, approach age as you would any other dimension of diversity: Resist the urge to make assumptions about an individual from another age group, and don't assume that your own group's approach is automatically superior.

GENDER DIFFERENCES

The perception of men and women in business varies from culture to culture.

Gender imbalances tend to get pronounced the further up the corporate ladder you look.

Broadly speaking, men tend to emphasize content in their messages, whereas women tend to emphasize relationship maintenance.

Many people do not fit or wish to be fit into a simplistic heterosexual, male/female categorization scheme.

Gender influences workplace communication in several important ways. First, the perception of men and women in business varies from culture to culture, and gender bias can range from overt discrimination to subtle and even unconscious beliefs.

Second, although the ratio of men to women in entry-level professional positions is roughly equal, the percentage of management roles held by men increases steadily the further up the corporate ladder one looks. This imbalance can significantly affect communication in such areas as mentoring, which is a vital development opportunity for lower and middle managers who want to move into senior positions.

Third, evidence suggests that men and women tend to have somewhat different communication styles. Broadly speaking, men emphasize content and outcomes in their communication efforts, whereas women place a higher premium on relationship maintenance.[24] As one example, men are more likely than women to try to negotiate a pay raise. Moreover, according to research by Linda Babcock of Carnegie Mellon University, both men and women tend to accept this disparity, viewing assertiveness as a positive quality in men but a negative quality in women. Changing these perceptions could go a long way toward improving communication and equity in the workplace.[25]

Fourth, outdated concepts of gender and sexual orientation continue to be a source of confusion, controversy, and discrimination. Many people do not fit or wish to be fit into a simplistic heterosexual, male/female categorization scheme, but discriminatory company policies and the behaviors and attitudes of supervisors and coworkers can deprive these individuals of a fair and satisfying work experience. In response, many companies have taken steps to ensure equal opportunities and fair treatment for lesbian, gay, bisexual, transgender, and questioning (LGBTQ) job applicants and employees.

Companies can also take steps to make sure their nondiscrimination policies protect employees' right to gender expression based on personal gender identity.[26] Communication plays a critical role in all these efforts, from listening to the needs of diverse employee groups to providing clear policies and educating employees on important issues.

RELIGIOUS DIFFERENCES

As one of the most personal and influential aspects of life, religion brings potential for controversy and conflict in the workplace setting. Many employees believe they should be able to follow and express the tenets of their faith in the workplace. In the United States, a variety of laws prohibit discrimination and harassment based on religion and require employers to make reasonable accommodations for religious beliefs and practices.[27]

U.S. law requires employers to accommodate employees' religious beliefs to a reasonable degree.

However, efforts to accommodate religions can sometimes create conflict in the workplace and with the demands of operating the business. The situation is complex, with no simple answers that apply to every situation. As more companies work to establish inclusive workplaces, you can expect to see this issue being discussed more often in the coming years.

ABILITY DIFFERENCES

Colleagues and customers with disabilities that affect communication represent an important aspect of the diversity picture. For example, people whose hearing, vision, cognitive ability, or physical ability to operate digital devices or machinery is impaired can be at a significant disadvantage in today's workplace. A growing number of companies now recognize the concept of *neurodiversity*, which refers to atypical thought and behavior patterns such as autism and social anxiety disorders, and the challenges that neurodiverse employees face.[28] As with other elements of diversity, success starts with respect for individuals and sensitivity to differences.

Employers can invest in a variety of *assistive technologies* that help people with disabilities perform activities that might otherwise be difficult or impossible. These technologies include devices and systems that help workers communicate, interact with computers and other equipment, and enjoy greater mobility in the workplace. Artificial intelligence and robotics are enabling an exciting new generation of assistive technologies. If you are interested in learning more about these tools or perhaps working for one of the companies that make them, search online for "assistive technologies."

Assistive technologies help employers create more inclusive workplaces and benefit from the contribution of people with physical or cognitive impairments.

Making information more accessible for all stakeholders is another key step that all companies can take. For example, people with vision impairments can use *screen readers* that convert on-screen text to audio. However, for these systems to work, the source material needs to be formatted in specific ways. Microsoft Word and Adobe Acrobat, two of the most commonly used document preparation tools in business, both offer advice on how to format documents for screen readers.

Adapting to Other Business Cultures

4 LEARNING OBJECTIVE
List four general guidelines for adapting to any business culture.

Whether you're trying to work productively with members of another generation in your own office or with a business partner on the other side of the world, adapting your approach is essential to successful communication. This section offers general advice on adapting to any business culture and specific advice for professionals from other cultures on adapting to U.S. business culture.

GUIDELINES FOR ADAPTING TO ANY BUSINESS CULTURE

You'll find a variety of tips in "Improving Intercultural Communication Skills," starting on page 83, but here are four general guidelines that can help all business communicators improve their cultural competency:

An important step in understanding and adapting to other cultures is to recognize the influences that your own culture has on your communication habits.

- **Become aware of your own biases.** Successful intercultural communication requires more than just an understanding of the other party's culture; you need to understand your own culture and the way it shapes your communication habits.[29] For instance, recognizing that you value independence and individual accomplishment will help you communicate more successfully in a culture that values consensus and group harmony.

Ignore the Golden Rule; treat people the way *they* want to be treated, not the way *you* want to be treated.

- **Be careful about applying the "Golden Rule."** You probably heard this growing up: "Treat people the way you want to be treated." The problem with the Golden Rule is that other people don't always want to be treated the same way you want to be treated, particularly across cultural boundaries. A better approach: Treat people the way *they* want to be treated.
- **Be accommodating and respectful, even if you don't understand or agree.** This can be an easy point to overlook in the rush of a business day, but cultural differences are in fact *different*. Being aware of differences is an essential first step, but it doesn't go far enough. Changing one's attitudes and behaviors to accommodate differences takes sustained effort and commitment.

Patience and a sense of humor can get you through most awkward moments in cross-cultural interaction.

- **Be patient and maintain a sense of humor.** Even the most committed and attuned business professionals can make mistakes in intercultural communication, so it is vital for all parties to be patient with one another. A sense of humor is a helpful asset as well, allowing people to move past awkward and embarrassing moments. When you make a mistake, simply apologize and, if appropriate, ask the other person to explain the accepted way; then move on.

GUIDELINES FOR ADAPTING TO U.S. BUSINESS CULTURE

If you are a recent immigrant to the United States or grew up in a culture outside the U.S. mainstream, you can apply all the concepts and skills in this chapter to adapt to U.S. business culture. Here are some key points to remember as you become accustomed to business communication in this country:

The values espoused by U.S. culture include individualism, equality, and privacy.

- **Individualism.** In contrast to cultures that value group harmony and group success, U.S. culture generally expects individuals to succeed by their own efforts, and it rewards individual success.[30] These reward mechanisms are not always fair, by any means, but individual reward remains an ideal. This emphasis on individual responsibility and reward can sometimes clash with the team orientation that many companies have.
- **Equality.** Although the country's historical record on equality has not always been positive and inequalities still exist, equality is considered a core American value. This principle applies to race, gender, social background, and even age. Americans generally believe that every person should be given the opportunity to pursue whatever dreams and goals he or she has in life.
- **Privacy and personal space.** Although this appears to be changing somewhat with the popularity of social networking and other personal media, people in the United States are accustomed to a fair amount of privacy. This applies to physical space as well; U.S. businesspeople tend to stand farther apart when talking than people in some other cultures do, for example.[31]
- **Time and schedules.** U.S. businesses value punctuality and the efficient use of time. For instance, meetings are typically expected to start and end at designated times.
- **Religion.** The United States does not have an official state religion. Many religions are practiced throughout the country, and people are expected to respect each other's beliefs. Again, this respect and accommodation is more an ideal than universal practice, but it is an ideal nonetheless.
- **Communication style.** Communication tends to be direct and focused more on content and transactions than on relationships or group harmony.

As with all observations about culture, these are generalizations, of course. Any nation of more than 300 million people will exhibit a wide variety of behaviors. However, following these guidelines will help you succeed in most business communication situations.

Improving Intercultural Communication Skills

5 LEARNING OBJECTIVE
Identify six steps you can take to improve your intercultural communication skills.

Communicating successfully across cultures requires a variety of skills (see Figure 3.2). You can improve your intercultural skills throughout your career by studying other cultures and languages, respecting preferences for communication styles, writing clearly, speaking and listening carefully, knowing when to use interpreters and translators, and helping others adapt to your culture.

STUDYING OTHER CULTURES

Successful intercultural communication can require the modification of personal communication habits.

Effectively adapting your communication efforts to another culture requires not only knowledge about the culture but also the ability and motivation to change your personal habits as needed.[32] Fortunately, you don't need to learn about the whole world all at once. Many companies appoint specialists for countries or regions, giving employees a chance to focus on just one culture at a time. And if your employer conducts business internationally, it may offer training and support for employees who need to learn more about specific cultures.

Making an effort to learn about another person's culture is a sign of respect.

Even a small amount of research and practice will help you get through many business situations. In addition, most people respond positively to honest effort and good intentions, and many business associates will help you along if you show an interest in learning more about their cultures. Don't be afraid to ask questions. People will respect

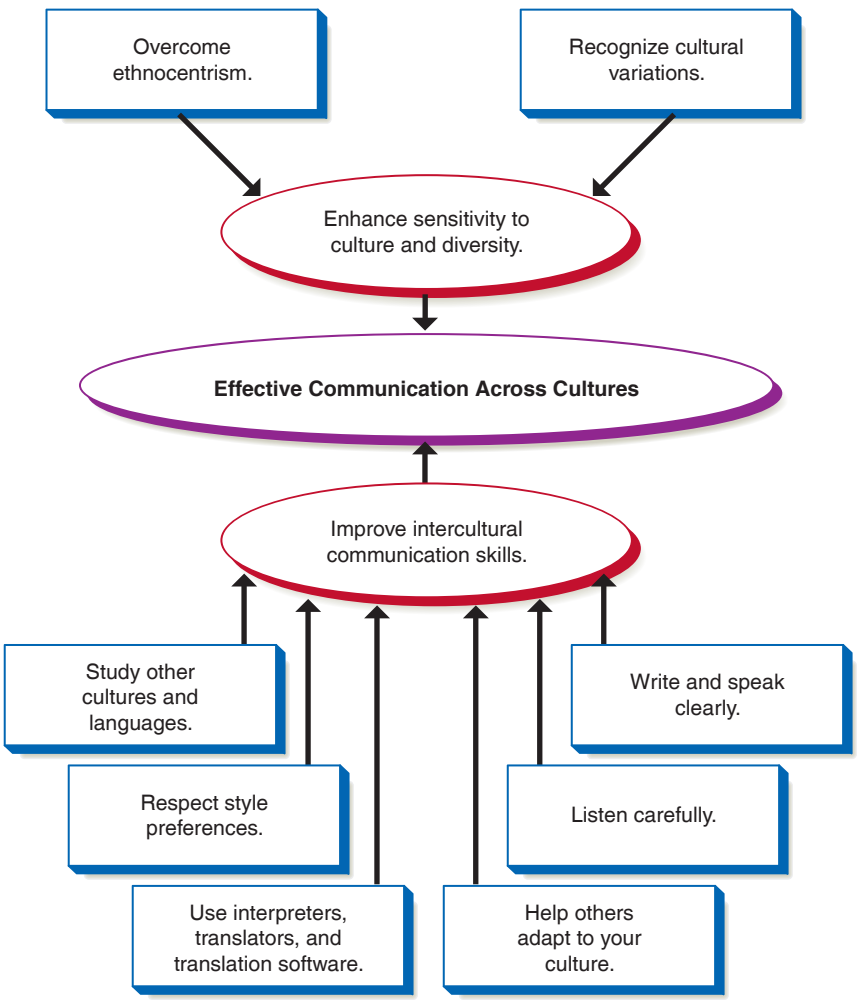


Figure 3.2 Components of Successful Intercultural Communication
Communicating in a diverse business environment is not always an easy task, but you can continue to improve your sensitivity and build your skills as you progress in your career.

your concern and curiosity. You will gradually accumulate considerable knowledge, which will help you feel comfortable and be effective in a wide range of business situations.

Numerous websites and books offer advice on traveling to other countries and working in specific cultures. Also try to sample newspapers, magazines, and even the music and movies of another country. For instance, a movie can demonstrate nonverbal customs even if you don't grasp the language. However, be careful not to rely solely on entertainment products. If people in other countries based their opinions of U.S. culture solely on the silly comedies and violent action movies the United States exports around the globe, what sort of impression do you imagine they would get?

For some of the key issues to research before doing business in another country, refer to Table 3.1.

TABLE 3.1 Doing Business in Other Cultures

Action	Details to Consider
Understand social customs	● How do people react to strangers? Are they friendly? Hostile? Reserved? ● How do people greet each other? Should you bow? Nod? Shake hands? ● How do people express appreciation for an invitation to lunch, dinner, or someone's home? Should you bring a gift? Send flowers? Write a thank-you note? ● Are any phrases, facial expressions, or hand gestures considered rude? ● How do you attract the attention of a waiter? Do you tip the waiter? ● When is it rude to refuse an invitation? How do you refuse politely? ● What topics may or may not be discussed in a social setting? In a business setting? ● How do social customs dictate interaction between men and women? Between younger people and older people?
Learn about clothing and food preferences	● What occasions require special attire? ● What colors are associated with mourning? Love? Joy? ● Are some types of clothing considered taboo for one gender or the other? ● How many times a day do people eat? ● How are hands or utensils used when eating? ● Where is the seat of honor at a table?
Assess political patterns	● How stable is the political situation? ● Does the political situation affect businesses in and out of the country? ● Is it appropriate to talk politics in social or business situations?
Understand religious and social beliefs	● To which religious groups do people belong? ● Which places, objects, actions, and events are sacred? ● Do religious beliefs affect communication between men and women or between any other groups? ● Is there a tolerance for minority religions? ● How do religious holidays affect business and government activities? ● Does religion require or prohibit eating specific foods? Eating at specific times?
Learn about economic and business institutions	● Is the society homogeneous or heterogeneous? ● What languages are spoken? ● What are the primary resources and principal products? ● Are businesses generally large? Family controlled? Government controlled? ● What are the generally accepted working hours? ● How do people view scheduled appointments? ● Are people expected to socialize before conducting business?
Appraise the nature of ethics, values, and laws	● Is money or a gift expected in exchange for arranging business transactions? ● Do people value competitiveness or cooperation? ● What are the attitudes toward work? Toward money? ● Is politeness more important than factual honesty?

STUDYING OTHER LANGUAGES

As commerce continues to become more globalized and many countries become more linguistically diverse, the demand for multilingual communicators continues to grow as well. The ability to communicate in more than one language can make you a more competitive job candidate and can open up a wider variety of career opportunities.

Even if your colleagues or customers in another country speak your language, it's worth the time and energy to learn common phrases in theirs. Doing so helps you get through everyday business and social situations and demonstrates your commitment to the business relationship. After all, the other person probably spent years learning your language.

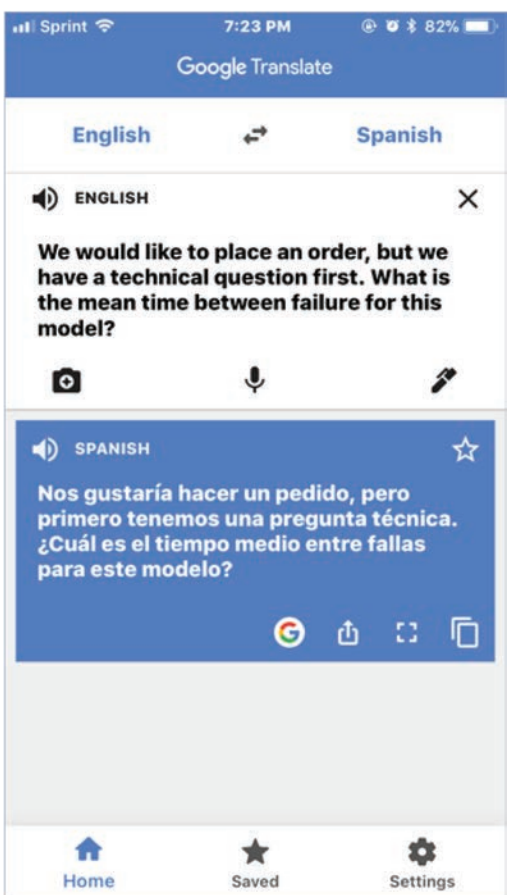
Even if your colleagues or customers in another country speak your language, make the effort to learn some common phrases in theirs.

Mobile devices can be a huge help in learning another language and in communicating with someone in another language. A wide variety of apps and websites are available that help with essential words and phrases, grammar, pronunciation, text translation, and even real-time audio translation (see Figure 3.3).

MOBILE APP

Memrise can help you learn new languages with the help of a worldwide community of fellow learners.

Finally, don't assume that people from two countries who speak the same language speak it the same way. The French spoken in Québec and other parts of Canada is often noticeably different from the French spoken in France. Similarly, it's often said that the United States and the United Kingdom are two countries divided by a common language. For instance, *period* (punctuation), *elevator*, and *gasoline* in the United States are *full stop*, *lift*, and *petrol* in the United Kingdom.



Courtesy of Android.

Figure 3.3 Mobile Language Tools
Translation apps are handy tools for working in multilingual business settings. Even if you don't speak a word of a particular language, you can get fast translations of essential phrases.

RESPECTING PREFERENCES FOR COMMUNICATION STYLE

Communication in many other cultures is more formal and less direct than it is in the United States, and politeness is valued highly.

Communication style—including the level of directness, the degree of formality, media preferences, and other factors—varies widely from culture to culture (see Figures 3.4a through 3.4d). Generally speaking, communication in many other cultures is more formal and less direct than it is in the United States, and politeness is valued highly.[33] To get up-to-date advice on communication with people in another country, search online for the specific country you are interest in (for example, "French business correspondence," "German business correspondence").

UpdraftRC
4308 Preston Highway
Louisville, KY 40213
Toll Free: 1.800.FLY.RITE
Fax: (502) 555-1324
www.updraftrc.com

Zhejang Shan Tou Manufacturing Company, Ltd.
Guoliwei Industry Park
Libang Road, Longgang District
Shenzhen, Guangdong, China

Dear Mr. Li,

My company, Updraft RC, has designed a cool new line of radio-control toys that use smartphones as the controller. We are looking for a manufacturing partner, and your firm is one of the candidates we're having a look at.

Before we discuss technical details, I must say I have two sets of concerns about working with a foreign manufacturer. The first involves all the usual—transportation costs, delays, quality control, and risk of intellectual property theft. I'll need some assurances on how you address these issues to make sure they don't become problems in our relationship.

Second, companies here in the States that use foreign manufacturers often have to deal with heavy news coverage and activist publicity on such matters as workplace safety, worker rights, and environmentally sensitive manufacturing. Even though the U.S. company doesn't directly control what happens in the overseas contract manufacturer, the U.S. company takes the heat when the media uncovers abuse, neglect, pollution, etc. I know that Nike and other U.S. companies have spent millions and worked for years to promote positive conditions in overseas factories, but even these major corporations haven't been able to completely avoid problems and bad press. How can I be sure that a small company such as ours will? I do not want our product launch to get caught up in some scandal over "sweatshops."

I look forward to seeing your comprehensive response as soon as possible.

All the best,

Henry Gatlin

Henry Gatlin
Founder, CEO
Updraft RC

5 August 2021

← Language such as *cool* and *having a look at* is too informal for external business communication, particularly for international correspondence.

← The tone of this paragraph is too demanding.

← *Here in the States* is too informal, and referring to the reader as *foreign* is potentially insulting.

← Inflammatory language such as *bad press, scandal,* and *sweatshops* will put the reader on the defensive and discourage a positive response.

← The request for a response sounds too demanding, and it lacks a specific deadline.

← The closing is too informal.

Figure 3.4a Intercultural Business Letter: Ineffective Original Draft
This letter (from a Kentucky company that designs radio-controlled airplanes) exhibits a number of problems that would create difficulties for its intended reader (the manager of a contract manufacturing company in China). Follow the changes in Figures 3.4b, 3.4c, and 3.4d to see how the letter was adapted and then translated for its target audience.

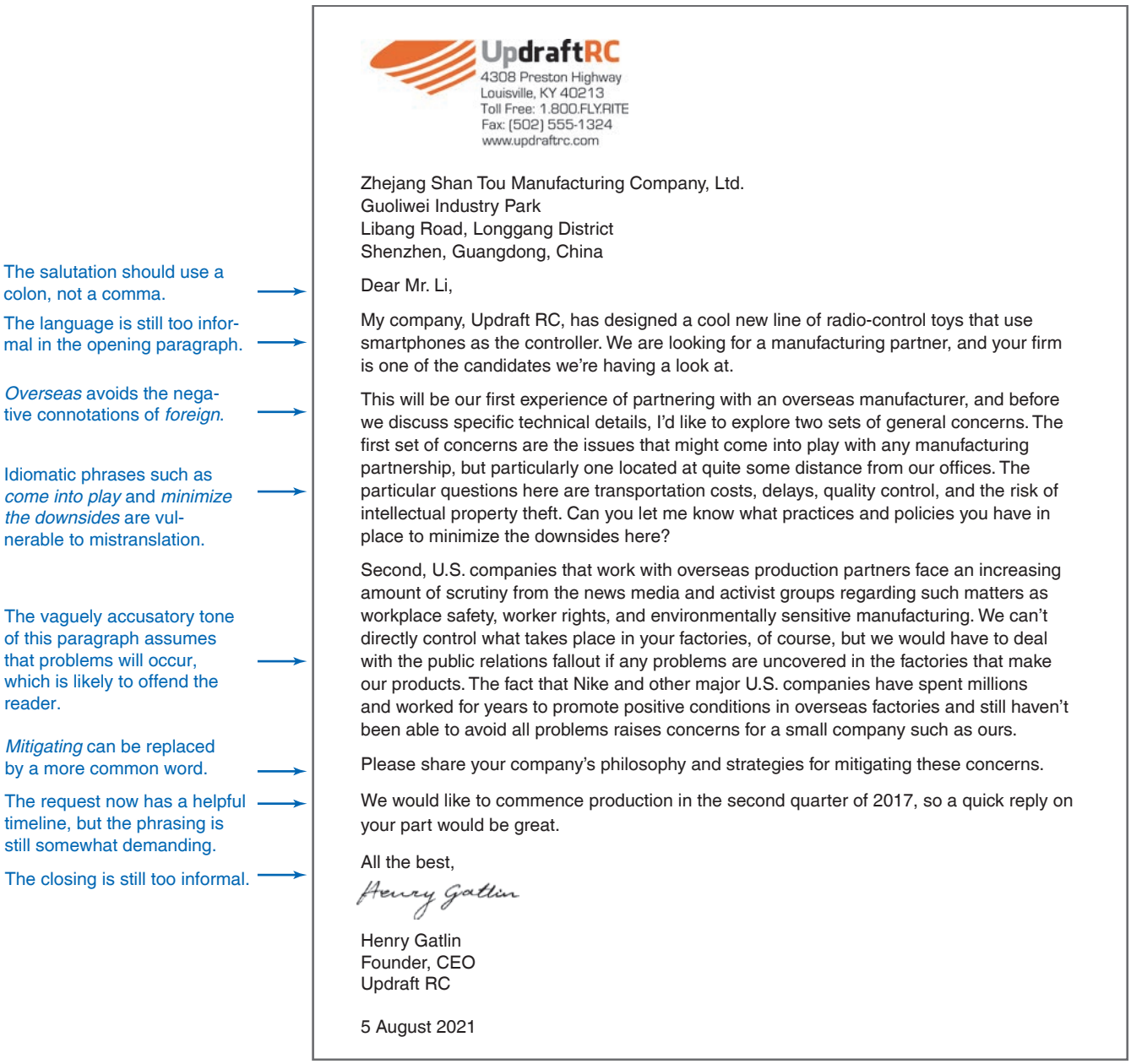


Figure 3.4b Intercultural Business Letter: First Revision
This version eliminates most of the problems with overly informal phrases and potentially offensive language. With these revisions, it would function well as a message between native speakers of English, but it still has some wording and formatting issues that could create difficulties for a Chinese reader. Compare with Figure 3.4c.

WRITING CLEARLY

Writing clearly is always important, of course, but it is essential when you are writing to people whose first language differs from yours. Follow these recommendations to make sure your message can be understood:

Clarity and simplicity are essential when writing to or speaking with people who don't share your native language.

- **Chose words carefully.** Look for short, precise words that say exactly what you mean.
- **Avoid words with multiple meanings.** As much as possible, choose words that have only one obvious meaning in the context in which you're using them. For example, *right* has more than 30 distinct meanings and can function as a noun, an adjective, a verb, and an adverb.[34] Whenever appropriate, use a synonym that conveys the specific meaning you intend, such as *correct*, *appropriate*, *desirable*, *moral*, *authentic*, or *privilege*.[35]

UpdraftRC
4308 Preston Highway
Louisville, KY 40213
Toll Free: 1.800.FLY.RITE
Fax: (502) 555-1324
www.updraftrc.com

Dear Mr. Li:

With the widespread adoption of mobile phones, more and more accessories and associated products are being developed to meet new market demands. My company, Updraft RC, has designed a new line of radio-controlled toys that use smartphones as the controller. Our market tests show strong potential for demand among younger consumers, who are often eager to try new products. We are now looking for a manufacturing partner, and we are very willing to collaborate with you.

This will be our first experience of partnering with an overseas manufacturer, and before we discuss specific technical details, I would like you to know two of our general concerns. The first concern involves all the general challenges of a long-distance manufacturing partnership, including transportation costs, shipping delays, quality control, and the risk of intellectual property theft.

Second, U.S. companies that work with overseas production partners face an increasing amount of scrutiny from the news media and activist groups regarding such matters as workplace safety, worker rights, and environmentally sensitive manufacturing. Nike and other major U.S. companies have spent millions of dollars and worked for years to improve conditions in overseas factories, but even they have not been able to avoid all problems. As a small company with no ability to monitor factories, we are worried about any manufacturing-related problems that could affect our public image.

Please share your company's philosophy and strategies for minimizing these two concerns.

We would like to commence production in the second quarter of 2017, so we would like to hear your reply as soon as possible.

Thank you,

Henry Gatlin

Henry Gatlin
Founder, CEO
Updraft RC

5 August 2021

← An inside address is typically not used in Chinese correspondence.

← The salutation uses a colon rather than a comma.

← The revised opening gives the reader some helpful context and the assurance that this is a meaningful business opportunity.

← The phrase "we are very willing to collaborate with you" shows respect for the reader and suggests the interest in forming a partnership.

← This paragraph has been shortened to eliminate the redundant request for information.

← This revised paragraph still conveys the seriousness of the writer's concerns without offending the reader.

← *Minimizing* is easier for a nonnative speaker to understand than *mitigating*.

← "Thank you" is a simple and adequately formal closing.

Figure 3.4c Intercultural Business Letter: Final Revision
Here is the final English version, revised to ensure more successful translation into Chinese and to conform to standard practices in Chinese business communication (including removing the inside address).

- **Write short, clear sentences.** Restrict each sentence to a single idea so that anyone translating it can focus on one idea at a time.
- **Keep paragraphs short.** Similarly, break information into smaller chunks that are easier for readers to process.
- **Use transitions generously.** Help readers follow your train of thought by using transitional words and phrases. For example, tie related points together with expressions such as *in addition* and *first*, *second*, and *third*.
- **Address international correspondence properly.** Refer to Appendix A for more information.
- **Cite numbers and dates in local formats.** Various countries use different formats for numbers and dates, so it's important to know what your readers expect. In the United States, for example, 12-05-22 refers to December 5 in the year 2022, but in many other countries, it means May 12. Similarly, in the United States and Great Britain, 1.000 means one with three decimal places, but it means one thousand in many European countries.



李华先生:

随着智能手机的普及，越来越多的配件和周边产品正在被研发以满足市场的需求。我们的公司，Updraft RC,已经设计了一种新型的用智能手机控制的遥控玩具。我们的市场测试表明年轻客户，一个愿意尝试新产品的群体，（对我们的产品）有巨大的潜在需求。我们现在正在寻找制造伙伴，所以我们非常愿意与你们合作。

这是我们第一次与海外制造伙伴合作，在我们讨论具细节之前，我非常愿意让你们知道我们的两个问题。第一个问题对远距制造商合作关系来说都是一个挑战，这个挑战包括运输费用，运输延迟，质量控制和知识产权盗窃。

第二，与大洋对岸合作的美国公司面临着越来越高的来自新媒体和活跃组织的审查。这些审查包括工作场所安全性，劳工权益和可能对环境产生损害的制造。耐克和其他主要的美国公司已经花费了数百万美元，工作了几十年用来提升海外工厂的情况，但是他们仍然不能避免所有的问题。对于没有能力监控（海外）工厂的小公司来说，我们比较当心与制造相关的一系列问题可能影响到我们公司的形象。

所以请让我们知道你们公司解决这两个问题的策略和方法。

我们计划在 2017 年的第二个季度投入产品的生产。所以我们希望尽快得到你们公司的回应。

亨利 加特林
创始人，首席执行官
2021年8月5日

Figure 3.4d Intercultural Business Letter: Translated Version
Here is the translated version, formatted in accordance with Chinese business communication practices.

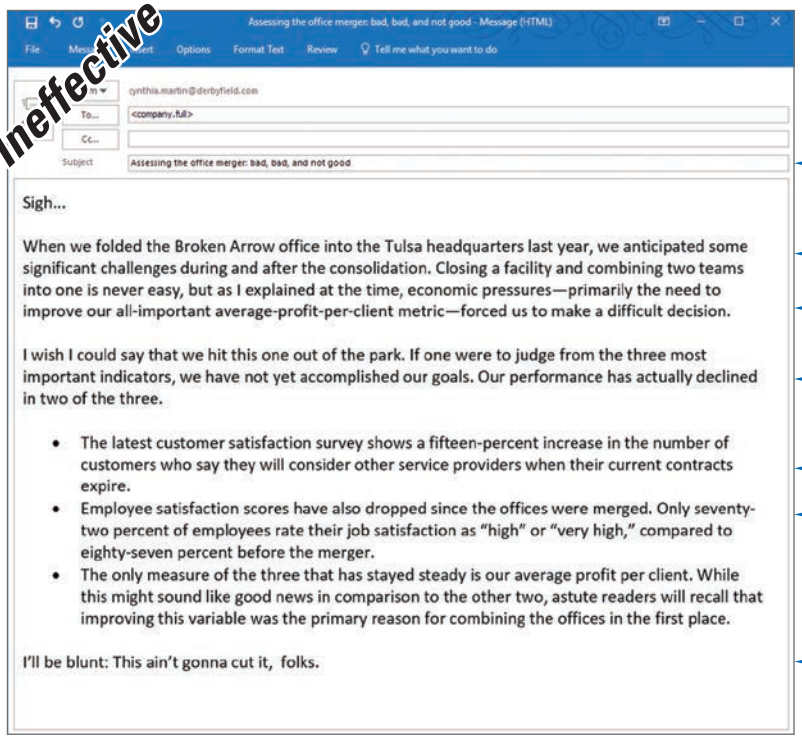
- **Avoid slang and idiomatic phrases.** Slang and **idiomatic phrases**—sayings that mean more than the sum of their literal parts—usually don't travel well across languages. For instance, complimenting someone for a "killer idea" makes sense to many U.S. English speakers, but it would make little sense to someone who knows only the literal meaning of the word *killer*. Similarly, your audience may have no idea what you're talking about if you use "knocked one out of the park," "more bang for the buck," and other idiomatic phrases.

When writing to someone who doesn't share your native language, avoid slang and *idiomatic phrases*—sayings that mean more than the sum of their literal parts.

- **Generally, avoid humor and references to popular culture.** Jokes and references to popular entertainment often rely on culture-specific information that might be completely unknown to your audience.

Humor does not "travel well" because it usually relies on intimate knowledge of a particular culture.

Figure 3.5 on the next page shows how attention to these details can make a message much easier for readers whose native language is different from yours.



Screenshot of Microsoft Outlook 2018, ©Microsoft Corporation

(a) The subject line tries to be clever regarding the three factors discussed in the message, but the message is not clear.

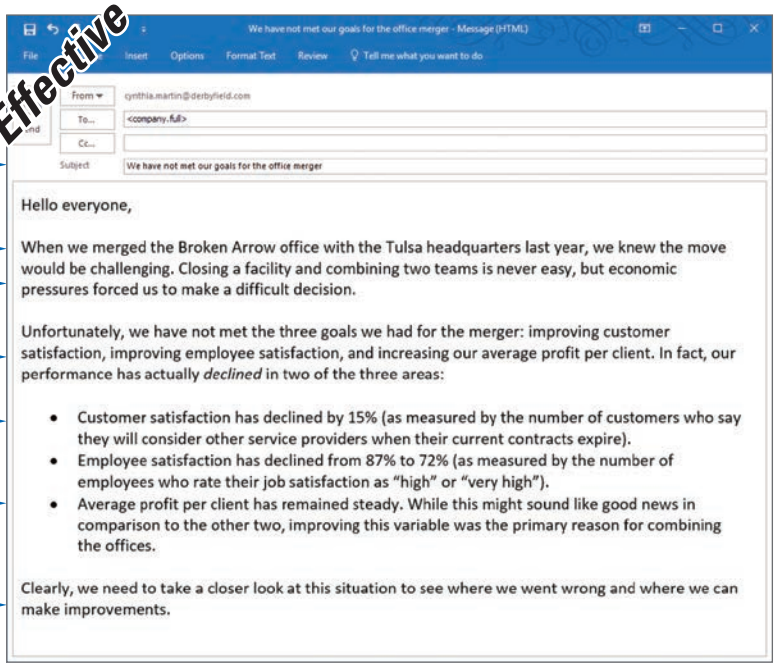
(b) *Folded* is an example of an English word with multiple meanings, which complicate translation and can lead to confusion.

(c) The second sentence is complicated and forces readers to follow multiple ideas at once, making it difficult to translate.

(d) The idiomatic phrase *hit one out of the park* might not make sense to readers who aren't familiar with baseball.

(e) Spelling out numbers instead of using numerals creates more work for readers. Also, the three indicators referred to in the paragraph above are buried in various places in the bullet points, making it harder for readers to find the key ideas.

(f) Nonstandard language (*ain't* and *gonna*) and the idiomatic phrase *cut it* may confuse some readers.



(a) The subject line is simple and easy to understand.

(b) *Merged* is easier to translate because it has fewer meanings and doesn't need the preposition *into*.

(c) The simplified structure of the second sentence is easier to translate and doesn't force the reader to process so many ideas at once.

(d) The idiomatic phrase *hit one out of the park* is replaced with clear, straightforward language.

(e) Using numerals (and the % symbol rather than *percent*) makes quantities and values easier to read. Also, the first bullet is reworded in order to use *declined* to match the term used in the introductory sentence immediately above, which simplifies interpretation. In the bullet points the three areas referred to in the introductory sentence now appear at the beginning of each statement.

(f) This sentence is clear to anyone who can read standard English, plus it avoids the accusatory tone of the original.

Figure 3.5 Writing for Multilingual Audiences
In today's global and diversified work environment, chances are that many of your messages will be read by people whose native language is not English. Notice how specific wording changes and modifications to sentence structure make the effective version easier for nonnative speakers to read.

SPEAKING AND LISTENING CAREFULLY

Languages vary in the significance of tone, pitch, speed, and volume, which can create challenges for people trying to interpret the explicit meaning of words themselves as well as the overall nuance of a message. The English word *progress* can be a noun or a verb, depending on which syllable you emphasize. In Chinese, the meaning of the word *ma* changes depending on the speaker's tone; it can mean *mother, hemp, horse,* or *scold*.[36]

To ensure successful conversations between parties who speak different native languages or even regional variations of the same language, speakers and listeners alike need to make accommodations.[37] Speakers should adjust the content of their messages and the style of their delivery to accommodate the needs of their listeners and the circumstances of the conversation. For example, if you are speaking in person or over a video connection, you can use hand gestures and other nonverbal signals to clarify your spoken message. However, when you don't have a visual connection, you must take extra care to convey your meaning through words and vocal characteristics alone. Conversely, listeners need to be tolerant of accents, vocabulary choices, gestures, and other factors that might distract them from hearing the meaning of a speaker's message.

When talking with people whose native language is different from yours, remember that the processing of even everyday conversations can be difficult. For instance, speakers from the United States sometimes string together multiple words into a single, mystifying pseudo-word, such as turning "Did you eat yet?" into "Jeetyet?" In spoken French, many word pairs are joined as a matter of rule, and the pronunciation can change depending on which words are next to one another. In these instances, listeners who aren't fluent in French can have a hard time telling when one word ends and the next one begins.

To be more effective in conversations with people from other language backgrounds, remember these tips: (1) Speak slowly and clearly; (2) don't rephrase until it's obviously necessary (immediately rephrasing something doubles the translation workload for the listener); (3) look for and ask for feedback to make sure your message is getting through; (4) don't talk down to the other person by overenunciating words or oversimplifying sentences to a degree that is potentially insulting; and (5) at the end of the conversation, double-check to make sure you and the listener agree on what has been said and decided.

As a listener, you'll need some practice to get a sense of vocal patterns. The key is simply to accept what you hear first, without jumping to conclusions about meaning or motivation. Let other people finish what they have to say. If you interrupt, you may miss something important. You'll also show a lack of respect. If you do not understand a comment, ask the person to repeat it. Any momentary awkwardness you might feel in asking for extra help is less important than the risk of unsuccessful communication.

To ensure successful conversations between parties who speak different native languages or even regional variations of the same language, speakers and listeners alike need to make accommodations.

To listen more effectively in intercultural situations, accept what you hear without judgment, and let people finish what they have to say.

MOBILE APP

iTranslate translates more than 100 languages and features voice input and output.

To be more effective in intercultural conversations, remember these tips:

- Speak slowly and clearly.
- Don't rephrase until it's obviously necessary.
- Look for and ask for feedback.
- Don't talk down to the other person.
- Double-check to make sure you and the other party agree.

INTELLIGENT COMMUNICATION TECHNOLOGY

Real-Time Translation

Trying to converse in a language in which you are not fully fluent presents a staggering cognitive workload. As a listener, you must convert the incoming sounds to discrete words and assemble those words into coherent phrases and sentences to extract the meaning—and if the other party uses idioms or slang, the task can get exponentially harder. And unlike reading a written document, you must do all this processing almost instantaneously, without the luxury of going back over something you didn't get. As a speaker, you have to find the right words, assemble them into phrases and sentences using the language's grammar rules, and then pronounce them all correctly enough so they make sense to the other party. Honing this level of proficiency can take years of study and practice.

Machine translation has been one of the long-standing goals of artificial intelligence, offering hope for real-time communication between people who don't have a common language. Systems such as Skype Translator and Google Translate are getting remarkably adept. Google's Pixel Buds ear buds offer nearly instantaneous translation across dozens of languages, so that it is theoretically possible to travel much of the world and converse with anyone who is similarly equipped, at least for basic conversations.

A variety of smartphone and smartwatch apps offer translation without the need for each party to have identical equipment; speakers take turns talking to the device and then listen as it outputs the translated speech. Microsoft's PowerPoint Presentation Translator adds real-time translation for presenters, making it easier for global professionals to connect with their audiences.

WHAT'S YOUR TAKE?

1. Do you think real-time translation, even if it gets close to the quality of human translators, will ever eliminate the need to learn other languages in order to communicate effectively with diverse, global audiences? Why or why not?
2. Find a partner who speaks another language and try one of these translation apps or services in a live conversation. How would you characterize the translation quality and the experience overall?

Sources: "Skype Translator," Skype, accessed 13 March 2019, www.skype.com; iTranslate Voice website, accessed 13 March 2019, itranslatevoice.com; "Presentation Translator," Microsoft, accessed 13 March 2019; Laura Cox, "Artificial Intelligence & Business Communication," *Disruption*, 22 May 2017, disruptionhub.com; Matthew Phenix, "Google Pixel Buds Review: What Travelers Need to Know," *Afar*, 24 September 2018, www.afar.com.

For important business meetings, consider using a professional interpreter.

For important meetings in which language might be a barrier, consider hiring an interpreter. The added expense could well be worth it to avoid misunderstandings and subtle language errors. The new generation of AI-enabled translating solutions can also be useful (see "Intelligent Communication Technology: Real-Time Translation" on the previous page).

HELPING OTHERS ADAPT TO YOUR CULTURE

Help others adapt to your culture; it will create a more productive workplace and teach you about their cultures as well.

Everyone can contribute to successful intercultural communication. Whether a younger person is unaccustomed to the formalities of a large corporation or a colleague from another country is working on a team with you, look for opportunities to help people fit in and adapt their communication style. For example, if a nonnative English speaker is making mistakes that could hurt his or her credibility, you can offer advice on the appropriate words and phrases to use. Most language learners truly appreciate this sort of assistance, as long as it is offered in a respectful manner. Moreover, chances are that while you're helping, you'll learn something about the other person's culture and language, too.

You can also take steps to simplify the communication process. For instance, oral communication in a second language is usually more difficult than written forms of communication, so instead of asking a foreign colleague to provide information in a conference call, you could ask for a written response instead of or in addition to the live conversation.

For a brief summary of ideas to improve intercultural communication in the workplace, see "Checklist: Improving Intercultural Communication Skills."

CHECKLIST ✓ Improving Intercultural Communication Skills

- Understand your own culture so that you can recognize its influences on your communication habits.
- Study other cultures so that you can appreciate cultural variations.
- Study the languages of people with whom you communicate, even if you can learn only a few basic words and phrases.
- Help nonnative speakers learn your language.
- Respect cultural preferences for communication style.
- Write clearly, using brief messages, simple language, generous transitions, and appropriate international conventions.
- Avoid slang, humor, and references to popular culture.
- Speak clearly and slowly, giving listeners time to translate your words.
- Ask for feedback to verify that communication was successful.
- Listen carefully and ask speakers to repeat anything you don't understand.

COMMUNICATION CHALLENGES AT Kaiser Permanente

Kaiser Permanente puts a high priority on appreciating diversity and fostering a sense of inclusiveness among employees and patients. Imagine you're a department manager in a Kaiser medical center, where you're expected to maintain a climate of inclusion and support for employees of every cultural background. How would you address these challenges?

INDIVIDUAL CHALLENGE: Mihai Ciceu joined your department after relocating from Romania last year. He is a brilliant pricing and underwriting analyst, but he resists working with other employees, even in team settings where collaboration is expected. Given the importance that you place on teamwork, how should you handle the situation? List several alternatives for addressing this dilemma, identify which approach you would choose, and explain why you would do so.

TEAM CHALLENGE: Over the past few months, you have noticed that your employees are breaking into ethnically based cliques. Members of ethnic groups eat together, socialize together, and often chat in their native languages while they work. You appreciate how these groups give their members a sense of community, but you worry that these informal communication channels are alienating employees who are outside these groups and fragmenting the flow of information. How can you encourage a stronger sense of community and teamwork within your department? Brainstorm at least three steps you can take to encourage better cross-cultural communication in your department.

Key Terms

cultural competency An appreciation for cultural differences that affect communication and the ability to adjust one's communication style to ensure that efforts to send and receive messages across cultural boundaries are successful

cultural context The pattern of physical cues, environmental stimuli, and implicit understanding that convey meaning between two members of the same culture

cultural pluralism The practice of accepting multiple cultures on their own terms

culture A shared system of symbols, beliefs, attitudes, values, expectations, and norms for behavior

diversity All the characteristics and experiences that define people as individuals

ethnocentrism The tendency to judge other groups according to the standards, behaviors, and customs of one's own group

high-context culture Culture in which people rely less on verbal communication and more on the context of nonverbal actions and environmental setting to convey meaning

idiomatic phrases Phrases or common sayings that mean more than the sum of their literal parts; such phrases can be difficult for nonnative speakers to understand

intercultural communication The process of sending and receiving messages between people whose cultural backgrounds could lead them to interpret verbal and nonverbal signs differently

low-context culture Culture in which people rely more on verbal communication and less on circumstances and nonverbal cues to convey meaning

stereotyping Assigning generalized attributes to an individual on the basis of membership in a particular culture or social group

xenophobia Fear of strangers and foreigners

Summary of Learning Objectives

1 Discuss the opportunities and challenges of intercultural communication. The global marketplace spans natural boundaries and national borders, allowing worldwide competition between businesses of all sizes. Therefore, today's businesspeople are likely to communicate across international borders with people who live in different cultures. Moreover, even domestic workforces are becoming more diverse, with employees having different national, religious, and ethnic backgrounds. In this environment, companies can benefit from a broad range of viewpoints and ideas, get a good understanding of diverse markets, and recruit workers from the broadest possible pool of talent. However, intercultural communication presents challenges as well, including motivating diverse employees to cooperate and to work together in teams as well as understanding enough about how culture affects language to prevent miscommunication.

2 Define cultural competency, and explain the influence of culture on business communication. Cultural competency includes an appreciation for cultural differences that affect communication and the ability to adjust one's communication style to ensure that efforts to send and receive messages across cultural boundaries are successful. Culture influences communication patterns and styles because members of a given culture tend to have similar assumptions about how people should think, behave, and communicate, and they tend to act on those assumptions in much the same way.

3 Explain the importance of recognizing cultural variations, and list eight key dimensions of cultural diversity. People from different cultures encode and decode messages differently, increasing the chances of misunderstanding. By recognizing and accommodating cultural differences, we avoid automatically assuming that everyone's thoughts and actions are just like ours. Begin by focusing on eight categories of differences: contextual differences (the degree to which a culture relies on verbal or nonverbal actions to convey meaning), legal and ethical differences (the degree to which laws and ethics are regarded and obeyed), social differences (how members value work and success, recognize status, define manners, and think about time), nonverbal differences (differing attitudes toward greetings, personal space, touching, facial expression, eye contact, posture, and formality), age differences (how members think about youth, seniority, and longevity), gender differences (how men and women communicate and the spectrum of gender identification), religious differences (how beliefs affect workplace relationships), and ability differences (inclusive strategies that enable people with disabilities to communicate more fully with the rest of the workforce).

4 List four general guidelines for adapting to any business culture. You can adapt to any business culture by (1) becoming aware of your own cultural biases so that you can understand how these forces shape your communication habits; (2) ignoring the Golden Rule (treating people the way you want them to treat you) and instead treating them the way *they* want to be treated; (3) exercising tolerance, flexibility, and respect; and (4) practicing patience and maintaining a sense of humor to get you through the bumpy spots.

5 Identify six steps you can take to improve your intercultural communication skills. Communicating successfully between cultures requires a variety of skills, all of which you can continue to improve throughout your career. Make your intercultural communication effective by (1) studying other cultures, (2) studying other languages, (3) respecting your audience's preferences for communication style, (4) writing as clearly as possible, (5) speaking and listening carefully, and (6) helping others adapt to your own culture.

Test Your Knowledge

To review chapter content related to each question, refer to the indicated Learning Objective.

3-1. What are the potential advantages of a diverse workforce? [LO-1]

3-2. What is cultural competency? [LO-2]

3-3. What does it mean for a culture to be *automatic, coherent*, and *complete*? [LO-2]

3-4. What is ethnocentrism, and how can it be overcome in communication? [LO-2]

3-5. What are three habits that can help a person develop cultural pluralism? [LO-2]

3-6. How do high-context cultures differ from low-context cultures? [LO-3]

3-7. What seven aspects of nonverbal communication are important to understand in any intercultural communication situation? [LO-3]

3-8. How does a sense of humor help during intercultural communication? [LO-4]

3-9. How can the Golden Rule cause problems in intercultural communication? [LO-4]

3-10. What steps can you take to help someone from another culture adapt to your culture? [LO-5]

Apply Your Knowledge

To review chapter content related to each question, refer to the indicated Learning Objective.

3-11. Make a list of the top five priorities in your life (for example, fame, wealth, family, spirituality, peace of mind, individuality, artistic expression). Compare your list with the priorities that appear to be valued in the culture in which you are currently living. (You can be as broad or as narrow as you like in defining *culture* for this exercise, such as overall U.S. culture or the culture in your college or university.) [LO-2]

3-12. Do the priorities in your list align with the culture's priorities? If not, how might this disparity affect your communication with other members of the culture? [LO-2]

3-13. How does making an effort to avoid assumptions contribute to the practice of cultural pluralism? [LO-3]

3-14. Why is it important to understand your own culture when attempting to communicate with people from other cultures? [LO-4]

3-15. Think about the last three movies or television shows set in the United States that you've watched. In what ways would these entertainment products be helpful or unhelpful for people from other countries trying to learn about U.S. culture? [LO-5]

3-16 How can helping someone adapt to your culture help you gain a better understanding of it yourself? [LO-5]

Practice Your Skills

Message for Analysis

3-17. **Adapting to Cultural Differences** [LO-5] Your boss wants to send a brief email message to welcome some employees who recently transferred to your department from the company's Hong Kong branch. These employees, all of whom are Hong Kong natives, speak English, but your boss asks you to review his message for clarity. What would you suggest your boss change in the following email message, and why? Would you consider this message to be audience centered? Why or why not? (Hint: Do some quick research on Hong Kong to identify the style of English that people in Hong Kong are likely to speak.)

> I wanted to welcome you ASAP to our little family here in the States. It's high time we shook hands in person and not just across the sea. I'm pleased as punch about getting to know you all, and I for one will do my level best to sell you on America.

Exercises

Each activity is labeled according to the primary skill or skills you will need to use. To review relevant chapter content, you can refer to the indicated Learning Objective. In some instances, supporting information will be found in another chapter, as indicated.

3-18. Intercultural Communication: Recognizing Cultural Variations [LO-1], [LO-3], [LO-4] Review the generation labels on pages 79–80. Based on your year of birth, in which generation are you categorized? Do you feel a part of this generation? Why or why not? If you were born outside the United States, do the generational boundaries seem accurate to you? Now consider the biases that you might have regarding other generations. Identify several of your generational beliefs that could create friction in the workplace. Summarize your responses to these questions in a post on your class blog or an email message to your instructor.

3-19. Intercultural Communication: Adapting to Cultural Variations [LO-2] You are a new manager at K & J Brick, a masonry products company that is now run by the two sons of the man who founded it 50 years ago. For years, the co-owners have invited the management team to a wilderness lodge for a combination of outdoor sports and annual business planning meetings. You don't want to miss the event, but you know that the outdoor activities weren't designed for someone like you, whose physical impairments prevent participation in the sporting events. Draft a short email message to the rest of the management team, suggesting changes to the annual event that will allow all managers to participate.

3-20. Intercultural Communication: Writing for Multiple-Language Audiences [LO-5] Reading English-language content written by nonnative speakers of English can be a good reminder of the challenges of communicating in another language. The writing can be confusing or even amusing at first glance, but the key to remember here is that your writing might sound just as confusing or amusing to someone else if your roles were reversed.

Identify a company that is based in a non-English speaking country but that includes English-language text on its website. (The advanced search capabilities of your favorite search engine can help you locate websites from a particular country.) Study the language on this site. Does it sound as though it was written by someone adept at English? If the first site you find has writing that sounds natural to a native U.S. English speaker, find another company whose website doesn't. Select a section of text, at least several sentences long, and rewrite it to sound more "American." Submit the original text and your rewritten version to your instructor.

3-21. Intercultural Communication: Writing for Multiple-Language Audiences; Collaboration: Team Projects [LO-5], Chapter 2 With a team assigned by your instructor, review the Facebook pages of five companies, looking for words and phrases that might be confusing to a nonnative speaker of English. If you (or someone on the team) are a nonnative speaker, explain to the team why those word choices could be confusing. Choose three sentences, headlines, company slogans, or other pieces of text that contain potentially confusing words and rewrite them to minimize the chances of misinterpretation. Try to retain the tone of the original—although you may find that doing so is impossible in some instances. Compile the original selections and your revised versions and then email the documents to your instructor.

3-22. Intercultural Communication: Speaking with Multiple-Language Audiences; Collaboration: Team Projects [LO-5], Chapter 2 Working with two other students, prepare a list of 10 examples of slang (in your own language) that might be misinterpreted or misunderstood during a business conversation with someone from another culture. Next to each example, suggest other words you might use to convey the same message. Do the alternatives mean *exactly* the same as the original slang or idiom? Submit your list of original words and suggested replacements, with an explanation of why each replacement is better than the original.

3-23. Intercultural Communication: Speaking with Multiple-Language Audiences; Media Skills: Podcasting [LO-5], Chapter 7 Your company was one of the first to use podcasting as a business communication tool. Executives frequently record messages (such as monthly sales summaries) and post them on the company's intranet site; employees from the 14 offices in Europe, Asia, and North America then download the files to their music players or other devices and listen to the messages while riding the train to work, exercising, and so on. Your boss asks you to draft the opening statement for a podcast that will announce a revenue drop caused by intensive competitive pressure. She reviews your script and hands it back with a gentle explanation that it needs to be revised for international listeners. Improve the following statement in as many ways as you can:

> Howdy, comrades. Shouldn't surprise anyone that we took a beating this year, given the insane pricing moves our knucklehead competitors have been making. I mean, how those clowns can keep turning a profit is beyond me, what with steel costs still going through the roof and labor costs heating up—even in countries where everybody goes to find cheap labor—and hazardous waste disposal regs adding to operating costs, too.

Expand Your Skills

Critique the Professionals

Find an online business document—such as a company website, blog post, Facebook page, or LinkedIn profile—that you believe commits an intercultural communication blunder by failing to consider the needs of at least some of its target readers. For example, a website might use slang or idiomatic language that could confuse some readers, or it might use language that offends some readers. In a post on your class blog, share the text you found, and explain why you think it does not succeed as effective intercultural communication. Be sure to include a link to the original material.

Sharpening Your Career Skills Online

Find a website, video, article, podcast, or presentation that offers advice on communicating with business contacts in another country or culture. Write a brief email message to your instructor describing the item you found and summarizing the career skills information you learned from it.

Build Your Career

In the Build Your Career exercises in Chapters 1 and 2, you looked at what you want to do in your career and what you have to offer employers and clients. Now it's time to explore ways to make yourself more valuable. You can divide this effort into two key parts: expanding your skill set and increasing your knowledge.

If you are already working, look for opportunities to take on new challenges that will develop valuable skills. For example, you might offer to mentor a new employee or search for ways to reduce operating costs. If you aren't in the professional workforce yet, look for volunteering, school activities, or project gigs to develop new skills. Even if these opportunities don't offer the specific *hard skills* (the technical aspects of a job) your future career requires, they often let you develop *soft skills* such as leadership, collaboration, and communication.

While you are developing skills, learn as much as you can about the professions you might join and the industries and companies in which you might work. Use Twitter, LinkedIn, Facebook, and YouTube to find and follow experts. You can get a feel for the big issues in a profession or an industry, start to grasp the insider jargon, and get a sense of what it is like to work in these careers. Employers look for candidates who show curiosity and industry knowledge, so you'll be giving yourself a big advantage in competing for the best jobs.

As you gain skills and knowledge, maintain lists of what you can do and what you have learned. This "professional inventory" will be the foundation of your personal branding effort (see the Build Your Career activities starting in Chapter 4) and your résumé and other employment communication efforts.

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PART 2 Applying the Three-Step Writing Process

CHAPTER 4 Planning Business Messages

CHAPTER 5 Writing Business Messages

CHAPTER 6 Completing Business Messages

Every professional can learn to write more effectively while spending less time and energy. Discover a proven writing process that divides the task of communicating into three clear steps: planning, writing, and completing messages. The process works for everything from blog posts to formal reports to your résumé. With a bit of practice, you'll be using the process to communicate more successfully with much less stress.



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4 Planning Business Messages

LEARNING OBJECTIVES

After studying this chapter, you will be able to

1. Describe the three-step writing process.
2. Explain why it's important to analyze a communication situation in order to define your purpose and profile your audience before writing a message.
3. Discuss information-gathering options for simple messages, and identify three attributes of quality information.
4. List the factors to consider when choosing the most appropriate medium for a message.
5. Explain why good organization is important to both you and your audience, and list the tasks involved in organizing a message.

COMMUNICATION CLOSE-UP AT Wolff Olins

www.wolffolins.com

What do the following activities have in common: watching a movie, reading a novel, and listening to a friend tell you how much she learned about herself during an amazing summer she spent volunteering? The common thread is *dramatic tension*—the need to know how the story is going to turn out. If you care about the person in the story, chances are you'll want to stick around to the end.

Storytelling might sound like an odd topic for a business communication course, but storytelling is at the heart of some of the most effective communication efforts, from heart-tugging TV commercials to engaging training materials to rousing motivational speeches. With more professionals and companies recognizing the power of narrative techniques, storytelling has become a hot topic in the business communication field.

As one of the most respected novelists and essayists of his generation, Pakistani writer Mohsin Hamid is an expert at storytelling. But it might come as a surprise to his many fans that he has a second career as the chief storytelling officer (CSO) for Wolff Olins, an international creativity consultancy based in London. In this role, Hamid helps business professionals and executives use the art of storytelling to engage with both internal and external audiences.



ATHENA PICTURE AGENCY LTD/Alamy Stock Photo

Novelist and essayist Mohsin Hamid has a second career as the chief storytelling officer at the London-based creative consultancy Wolff Olins.

For example, the company heard from a number of top executives about the challenges of conveying to employees a clear sense of the company's purpose and empowering them to apply their individual creative energies to achieving that purpose. Hamid explains that it's unrealistic to expect an executive to give everyone in the organization explicit task assignments. Instead, he or she can tell the company's story—where it came from, the reason it exists, and where it is heading—to help employees align their efforts in that shared mission.

Hamid advises executives to engage in this sort of strategic

storytelling at three key stages of a company's evolution: when it is first launched, so that everyone knows where and how the company intends to grow; whenever major changes occur, so that everyone understands how the narrative has changed; and whenever the company's growth trajectory stalls, to reiterate what the company stands for and how it can overcome the odds. For instance, if a company is facing new competition, the CEO could relate a story from the company's past about how people came together to find better ways to satisfy customers and thereby protect the business.

By the way, business storytelling has an important personal angle as well. You can map out your career using storytelling (see page 118), and when you're interviewing for jobs, you will be prepared in case an interviewer pops the classic question "So, what's your story?" By visualizing a satisfying ending to your own career story, you'll have a better idea of what it takes to get there.[1]

Understanding the Three-Step Writing Process

1 LEARNING OBJECTIVE
Describe the three-step writing process.

The three-step writing process consists of *planning*, *writing*, and *completing* your messages.

The emphasis that Wolff Olins (profiled in the chapter opener) puts on connecting with audiences is a lesson that applies to business messages for all stakeholders. By following the process introduced in this chapter, you can create successful messages that meet audience needs and highlight your skills as a perceptive business professional.

The three-step writing process (see Figure 4.1) helps ensure that your communication efforts are both *effective* (meeting your audience's needs and getting your points across) and *efficient* (making the best use of your time and your audience's time):

- **Step 1: Planning messages.** To plan any message, first *analyze the situation* by defining your purpose and developing a profile of your audience. When you're sure what you need to accomplish with your message, *gather the information* that will meet your audience's needs. Next, *select the best combination of medium and channel* to deliver your message. Then *organize the information* by defining your main idea,

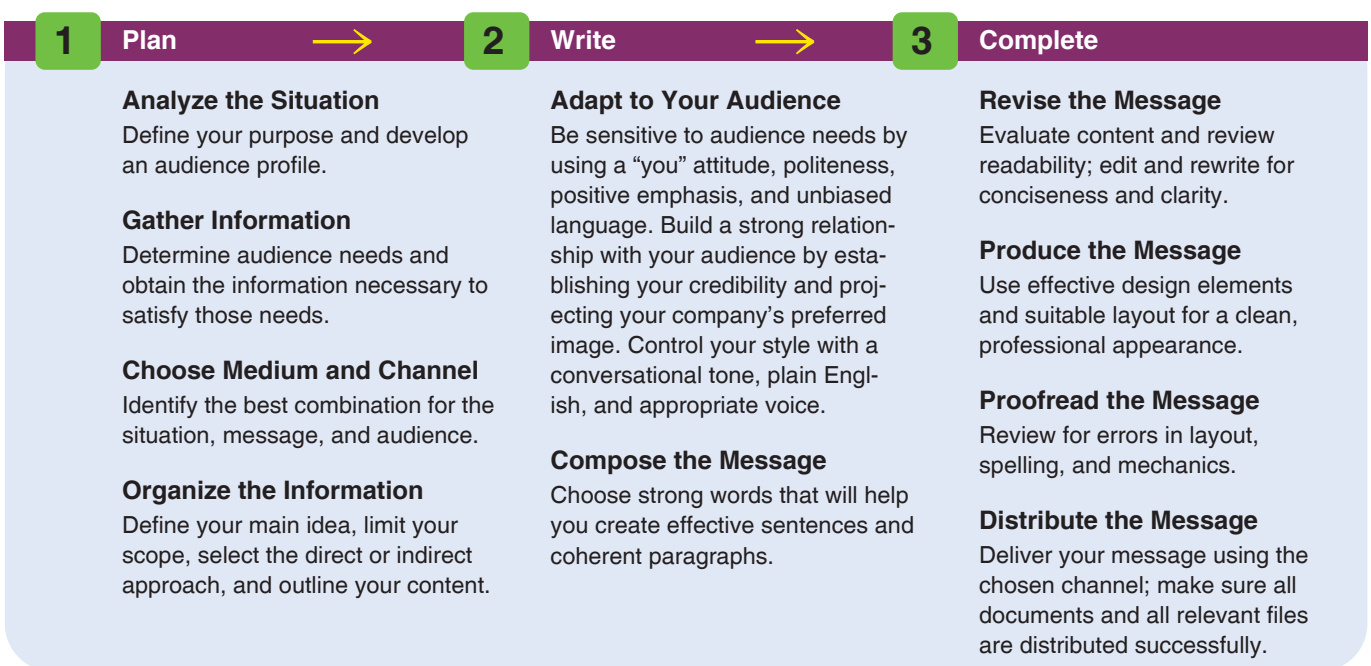


Figure 4.1 The Three-Step Writing Process
This three-step process will help you create more effective messages in any medium. As you get more practice with the process, it will become easier and more automatic.
Sources: Kevin J. Harty and John Keenan, *Writing for Business and Industry: Process and Product* (New York: Macmillan Publishing Company, 1987), 3–4; Richard Hatch, *Business Writing* (Chicago: Science Research Associates, 1983), 88–89; Richard Hatch, *Business Communication Theory and Technique* (Chicago: Science Research Associates, 1983), 74–75; Center for Humanities, *Writing as a Process: A Step-by-Step Guide* (Mount Kisco, N.Y.: Center for Humanities, 1987); Michael L. Keene, *Effective Professional Writing* (New York: D. C. Heath, 1987), 28–34.

limiting your scope, selecting the direct or indirect approach, and outlining your content. Planning messages is the focus of this chapter.

- **Step 2: Writing messages.** After you've planned your message, *adapt to your audience* by using sensitivity, relationship skills, and an appropriate writing style. Then you're ready to *compose your message* by making thoughtful word choices, crafting effective sentences, and developing coherent paragraphs. The writing step is discussed in Chapter 5.
- **Step 3: Completing messages.** After writing your first draft, *revise your message* by evaluating the content, reviewing readability, and editing and rewriting until your message comes across concisely and clearly, with correct grammar, proper punctuation, and effective format. Next, *produce your message*. Put it into the form that your audience will receive and review all design and layout decisions for an attractive, professional appearance. *Proofread* the final product to ensure high quality, and then *distribute your message*. The completing step is discussed in Chapter 6.

Throughout this book, you'll learn how to apply these steps to a wide variety of communication activities.

Check out the "Five-Minute Guide to Planning a Business Message or Document" at the end of the chapter.

OPTIMIZING YOUR WRITING TIME

The more you use the three-step process, the more intuitive and automatic it will become. You will also get better at allotting time for each task during a writing project. As a general rule, set aside roughly 50 percent of that time for planning, 25 percent for writing, and 25 percent for completing.

Reserving half your time for planning might seem excessive, but as the next section explains, careful planning usually saves time overall by focusing your writing and reducing rework. Of course, the ideal time allocation varies from project to project. Simpler and shorter messages require less planning than long reports, websites, and other complex projects. Also, the time required to produce and distribute messages can vary widely, depending on the media, the size of the audience, and other factors. Start with the 50-25-25 split, and adjust as needed for each project.

As a starting point, reserve half your available time for planning, one-quarter for writing, and one-quarter for completing a message; adjust for each project as needed.

PLANNING EFFECTIVELY

As soon as the need to create a message appears, inexperienced communicators are tempted to dive directly into writing. However, skipping or shortchanging the planning stage often creates extra work and stress later in the process. First, thoughtful planning is necessary to make sure you provide the right information in the right format to the right people. Taking the time to understand your readers or listeners and their needs helps you find and assemble the facts they're looking for and deliver that information in a concise and compelling way. Second, with careful planning, the writing stage is faster, easier, and much less stressful. Third, planning can save you from embarrassing blunders that could hurt your company or your career.

For everything beyond brief and simple messages, resist the urge to skip the planning step.

Analyzing the Situation

Every communication effort takes place in a particular situation, meaning you have a specific message to send to a specific audience under a specific set of circumstances. For example, describing your professional qualifications in an email message to an executive in your own company differs significantly from describing your qualifications in your LinkedIn profile. The email message is likely to be focused on a single goal, such as explaining why you would be a good choice to head up a major project, and you have the luxury of focusing on the needs of a single, personally identifiable reader. In contrast, your social networking profile could have multiple goals, such as connecting with your peers at other companies and presenting your qualifications to potential employers, and it might be viewed by hundreds or thousands of readers, each with his or her own interests.

The underlying information for these two messages could be roughly the same, but the level of detail to include, the tone of the writing, the specific word choices, and other decisions you need to make will differ from one situation to another. Making the right choices starts with clearly defining your purpose and understanding your audience's needs.

2 LEARNING OBJECTIVE

Explain why it's important to analyze a communication situation in order to define your purpose and profile your audience before writing a message.

Understanding the situation is essential for getting the content and tone of a message right.

DEFINING YOUR PURPOSE

The *general purpose* of a message can be categorized as informing, persuading, or collaborating.

The *specific purpose* of a message identifies exactly what you want to accomplish with the message.

All business messages have a **general purpose**: to inform, to persuade, or to collaborate with the audience. This purpose helps define the overall approach you'll need to take. Within the scope of its general purpose, each message also has a **specific purpose**, which identifies what you hope to accomplish with the message. What do you want the audience to think or do after receiving it? The more precisely you can define your specific purpose, the better you'll be able to fine-tune your message to achieve your desired outcome. For example, "get approval to hire three analysts by June 1 so we can meet our November 15 deadline" is more helpful as a planning device than a vague statement such as "get approval to hire more staff."

After defining your purpose, verify that the message will be worth the time and effort required to create, send, and receive it.

After you have defined your specific purpose, take a moment for a reality check. Assess whether that purpose merits the time and effort required for you to prepare and send the message—and for your audience to spend the time required to read it, view it, or listen to it. Ask these four questions:

- **Will anything change as a result of your message?** Don't contribute to information overload by sending messages that won't change anything. For instance, if you don't like your company's latest advertising campaign but you're not in a position to influence it, sending a critical message to your colleagues probably won't change anything or benefit anyone.
- **Is your purpose realistic?** Recognizing whether a goal is realistic is an important part of having good business sense. For example, if you request a raise while the company is struggling, you might send the message that you're not tuned in to the situation around you.
- **Is the time right?** People who are busy or distracted when they receive your message are less likely to pay attention to it. Many professions and departments have recurring cycles in their workloads, for instance, and messages sent during peak times may be ignored.
- **Is your purpose acceptable to your organization?** Your company's business objectives and policies, and even laws that apply to your industry, may dictate whether a particular purpose is acceptable. For example, if you work for a discount stock brokerage (one that doesn't offer investing advice), it would be inappropriate to write a newsletter article on the pros and cons of investing in a specific company.

When you are satisfied that you have a clear and meaningful purpose and that this is a smart time to proceed, your next step is to understand the members of your audience and their needs.

DEVELOPING AN AUDIENCE PROFILE

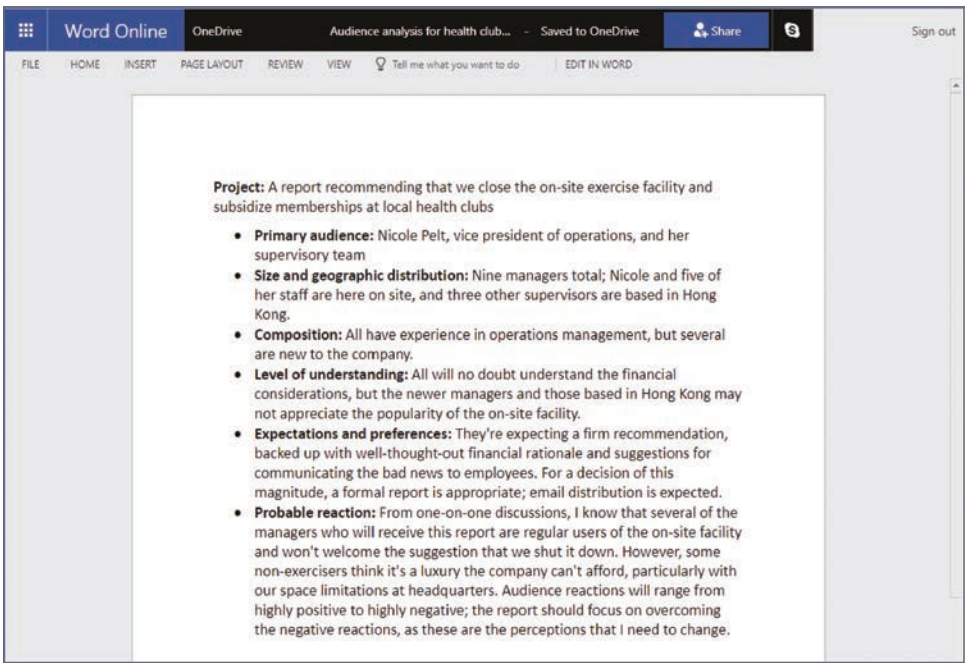
An audience profile answers key questions about your readers or listeners:

- Who are they?
- How many people do you need to reach?
- How much do they already know about the subject?
- What is their probable reaction to your message?

If a message has more than one audience, prioritize the information needs of the primary audience.

Before audience members will take the time to read or listen to your messages, they must be interested in what you're saying. They need to know that the message is relevant to their needs—even if they don't necessarily want to read or see it. The more you know about your audience members and their needs and expectations, the more effectively you'll be able to communicate with them. Figure 4.2 provides an example of the kind of information to compile in an audience analysis. Conducting such an analysis involves the following steps:

- **Identify your primary audience.** For some messages, certain audience members may be more important than others. Don't ignore the needs of less influential members, but make sure you address the concerns of the key decision-makers.
- **Determine audience size and geographic distribution.** A message aimed at 10,000 people spread around the globe could require a different approach than one aimed at a dozen people down the hall.
- **Determine audience composition.** Look for similarities and differences in culture, language, age, education, organizational rank and status, attitudes, experience, motivations, biases, beliefs, and any other factors that might affect the success of your message (see Figure 4.3).



Screenshot of Microsoft Word 2018, ©Microsoft Corporation

Figure 4.2 Using Audience Analysis to Plan a Message
For simple, routine messages, you usually don't need to analyze your audience in depth. However, for complex messages or messages for indifferent or hostile audiences, take the time to study their information needs and potential reactions to your message.

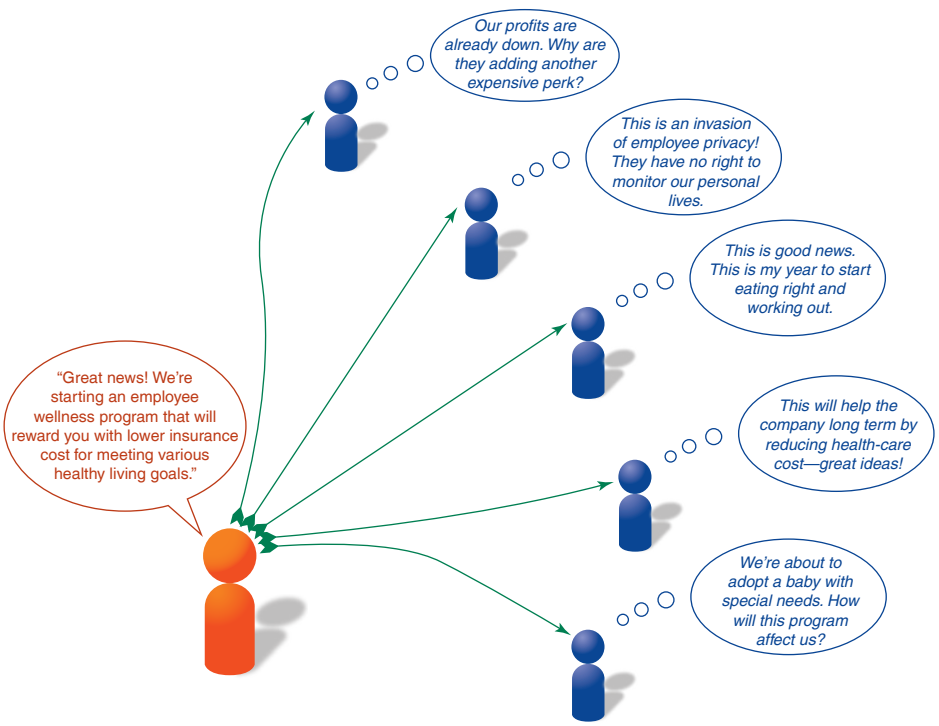


Figure 4.3 Predicting the Effects of Audience Composition
The attitudes and beliefs of individual audience members can have a significant impact on the success of a message. In this scenario, for instance, a seemingly positive message about employee benefits can generate a wide range of responses from employees with different beliefs and concerns.

Understand your readers' or listeners' expectations so you can meet their information needs without providing too much or too little.

- **Gauge audience members' level of understanding.** If audience members are not well versed in the topic, you may need to provide some background and context.
- **Understand audience expectations and preferences.** For example, will members of your audience expect complete details or just a summary of the main points? In general, for internal communication, the higher up the organization your message goes, the fewer details people want to see.
- **Forecast probable audience reaction.** As you'll read later in the chapter, the reaction you are likely to get from the audience should influence the way you organize a message. If you expect a favorable response, you can state conclusions and recommendations up front and offer minimal supporting evidence. If you expect to encounter skepticism, you can introduce conclusions gradually and with more proof.

Gathering Information

3 LEARNING OBJECTIVE
Discuss information-gathering options for simple messages, and identify three attributes of quality information.

When you have a clear picture of your audience, your next step is to assemble the information to include in your message. For simple messages, you may already have all the information in hand, but for more complex messages, you might need to do some research and analysis before you begin writing. Chapter 13 explores formal research techniques for finding, evaluating, and processing information, but you can always use a variety of informal techniques to gather insights and guide your research efforts:

If a project doesn't require formal research techniques, or if you need answers in a hurry, you can use a variety of informal techniques to gather the information your audience needs.

Take advantage of social media in your research; enthusiasts and experts frequently share ideas and information on Twitter, Facebook, and other social platforms.

- **Consider the audience's perspective.** Put yourself in the audience's position. What are these people thinking, feeling, or planning? What information do they need? If you are initiating a conversation in a social media context, what information will stimulate discussion in your target communities?
- **Listen to the community.** For almost any subject related to business these days, chances are there is at least one connected community of customers, product enthusiasts, or other people who engage in online discussions. Find them and listen to what they have to say.
- **Read reports and other company documents.** Annual reports, financial statements, news releases, blogs by industry experts, marketing reports, and customer surveys are just a few of the many potential sources. Find out whether your company has a *knowledge management system* or other system that collects the experiences and insights of employees throughout the organization.
- **Talk with supervisors, colleagues, or customers.** Fellow workers and customers may have information you need, or they may have good insights into the needs of your target audience.
- **Ask your audience for input.** If you're unsure what audience members need from you, ask them, if possible. Admitting you don't know but want to meet their needs will impress an audience more than guessing and getting it wrong.

UNCOVERING AUDIENCE NEEDS

Audience members might not be able to describe all the information they need, or you might not have the opportunity to ask them, so you may have to engage in some detective work.

In many situations, your audience's information needs will be obvious, or readers will be able to tell you what they need. In other situations, though, people may be unable to articulate exactly what they want. If someone makes a vague or broad request, ask questions to narrow the focus. If your boss says, "Find out everything you can about Naxos Records," narrow the investigation by asking which aspect of the company and its business is most important. Asking a question or two often prompts the person to think through the request and define more precisely what is required.

In addition, try to think of relevant information needs that your audience may not have expressed. Suppose you've been asked to compare two health insurance plans for your firm's employees, but your research has uncovered a third alternative that might be even better. You could then expand your report to include a brief explanation of

why the third plan should be considered and compare it with the two original plans. Use judgment, however; in some situations, you should provide only what the audience expects and nothing more.

FINDING YOUR FOCUS

You may encounter situations in which the assignment or objective is so vague that you have no idea how to get started in determining what the audience needs to know. In such cases, you can use some discovery techniques to help generate ideas and uncover possible avenues to research. One popular technique is **free writing**, in which you write whatever comes to mind, without stopping to make any corrections, for a set period of time. The big advantage of free writing is that you silence your "inner critic" and just express ideas as they come to you. You might end up with a rambling mess, but that's not important. Within that tangle of expressions, you might also find some useful ideas and angles that hadn't occurred to you yet—perhaps the crucial idea that will jumpstart the entire project.

Use *free writing*—writing whatever comes to mind without stopping or correcting for a fixed period of time—and other discovery techniques if you need to find the focus of a new writing project.

The best discovery option in some cases might not be writing at all, but rather *sketching*. If you're unable to come up with any words, grab a sketchpad or mobile tablet and start drawing. While you're thinking visually, your brain might release some great ideas that were trapped behind words.

The techniques listed under "Defining Your Main Idea" on page 114 can also be helpful if you don't know where to start.

PROVIDING REQUIRED INFORMATION

After you have defined your audience's information needs, your next step is to satisfy those needs completely. One good way to test the thoroughness of your message is to use the **journalistic approach**: Check to see whether your message answers *who, what, when, where, why*, and *how*. Using this method, you can quickly tell whether a message fails to deliver. For example, consider this message that requests information from employees:

The *journalistic approach* asks *who, what, when, where, why*, and *how* about a subject.

> We are exploring ways to reduce our office space leasing costs and would like your input on a proposed plan in which employees who telecommute on alternate days could share offices. Please let me know what you think of this proposal.

The message fails to tell employees everything they need to know in order to provide meaningful responses. The *what* could be improved by identifying the specific information the writer needs from employees (such as whether individual telecommuting patterns are predictable enough to allow scheduling of shared offices). The writer also doesn't specify *when* the responses are needed or *how* the employees should respond. By failing to address such points, the request is likely to generate a variety of responses, some possibly helpful but some probably not.

MOBILE APP

Evernote helps you collect, organize, and retrieve information when planning your writing projects.

Be Sure the Information Is Accurate

The *quality* of the information you provide is every bit as important as the *quantity*. Inaccurate information in business messages can cause a host of problems, from embarrassment and lost productivity to serious safety and legal issues. You may commit the organization to promises it can't keep—and the error could harm your reputation. Also, inaccurate information may persist for years after you distribute it or attempt to correct it.

You have a responsibility to provide quality information to your readers.

You can minimize mistakes by double-checking every piece of information you collect, whenever feasible, and finding multiple sources to corroborate important facts and figures. If you are using sources outside the organization, ask yourself whether the information is current and reliable. As Chapter 13 notes, you must be particularly careful when using sources you find online. Be sure to review any mathematical or financial calculations. Check all dates and schedules, and examine your own assumptions and conclusions to be certain they are valid.

Whenever feasible, double-check the information you collect and find multiple sources to corroborate important facts and figures.

Be Sure the Information Is Ethical

By working hard to ensure the accuracy of the information you gather, you'll also avoid many ethical problems in your messages. If you do make an honest mistake, such as delivering information you initially thought to be true but later found to be false, contact the recipients of the message immediately and correct the error. No one can reasonably fault you in such circumstances, and people will respect your honesty.

Omitting important information can be an unethical decision.

Messages can also be unethical if important information is omitted (see "Ethics Detective: Solving the Case of the Missing Safety Warning"). Of course, you may have legal or other sound business reasons for not including every detail about every matter. Just how much detail should you include? A simple test is to make sure you include enough to avoid misleading your audience.

Be Sure the Information Is Pertinent

Select the information to include based on how pertinent it is to your readers.

When gathering information for your message, remember that some points will be more important to your audience than others. Audience members will appreciate your efforts to prioritize the information they need and filter out the information they don't. Moreover, by focusing on the information that concerns your audience the most, you increase your chances of accomplishing your own communication goals.

If you don't know your audience or if you're communicating with a large group of people who have diverse interests, use common sense to identify points of interest. Audience factors such as age, job, location, income, and education can give you clues. If you're trying to sell memberships in a health club, you might adjust your message for athletes, busy professionals, families, and people in different locations or in different income brackets. The comprehensive facilities and professional trainers would appeal to athletes, whereas the low monthly rates would appeal to people on tight budgets.

Some messages necessarily reach audiences with a diverse mix of educational levels, subject awareness, and other variables. If possible, provide each audience segment with its own targeted information, such as by using sections in a brochure or links on a webpage.

ETHICS DETECTIVE

Solving the Case of the Missing Safety Warning

Your company, Furniture Formations, creates a variety of home furniture products, with extensive use of fine woods. To preserve the look and feel of the wood, your craftspeople use a linseed oil–based finish that you purchase from a local wholesaler. The workers apply the finish with rags, which are thrown away after each project. After a news report about spontaneous combustion of waste rags occurring in other furniture shops, you grow concerned enough to contact the wholesaler and ask for verification of the product's safety. The wholesaler knows you've been considering a nonflammable, water-based alternative from another source but tries to reassure you with the following message:

> Seal the rags in an approved container and dispose of it according to local regulations. As you probably already know, county regulations require all commercial users of oil-based materials to dispose of leftover finishes at the county's hazardous waste facility.

You're still not satisfied. You visit the website of the oil's manufacturer and find the following cautionary statement about the product you're currently using:

> Finishes that contain linseed oil or tung oil require specific safety precautions to minimize the risk of fire. Oil-soaked rags and other materials such as steel wool must be sealed in water-filled metal containers and then disposed of in accordance with local waste management regulations. Failure to do so can lead to spontaneous combustion that results from the heat-producing chemical reaction that takes place as the finish dries. In particular, DO NOT leave wet, oil-soaked rags in a pile or discard them with other waste.

ANALYSIS

1. Was the wholesaler guilty of an ethical lapse in this case? If yes, explain what you think the lapse is and why you believe it is unethical. If no, explain why you think the statement qualifies as ethical.

Selecting the Best Combination of Media and Channels

4 LEARNING OBJECTIVE
List the factors to consider when choosing the most appropriate medium for a message.

With the necessary information in hand, your next decision involves the best combination of media and channels to reach your target audience. As you recall from Chapter 1, the medium is the *form* a message takes, and the channel is the *system* used to deliver the message. The distinction between the two isn't always crystal clear, and some people use the terms in different ways, but these definitions are a useful way to think about the possibilities for business communication.

Most media can be distributed through more than one channel, so whenever you have a choice, think through your options to select the optimum combination. For example, a brief written message could be distributed as a printed letter or memo, or it could be distributed through a variety of digital channels, from email to blogging to social networking.

THE MOST COMMON MEDIA AND CHANNEL OPTIONS

Media can be divided into *oral*, *written*, and *visual* forms, and all three can be distributed through *digital* and *nondigital* channels.

The simplest way to categorize media choices is to divide them into *oral* (spoken), *written*, and *visual*. Each of these media can be delivered through *digital* and *nondigital channels*, which creates six basic combinations, discussed in the following sections. Table 4.1 on the next page summarizes the general advantages and disadvantages of the six medium/channel combinations. Specific options within these categories have their own strengths and weaknesses to consider as well. (For simplicity's sake, subsequent chapters occasionally use *digital media* to indicate any of the three media types delivered through digital channels.)

Oral Medium, In-Person Channel

The nonverbal and interactive aspects of in-person communication are difficult to replicate in most other media/channel combinations.

The oral medium, in-person channel combination involves talking with people who are in the same location, whether it's a one-on-one conversation over lunch or a more formal speech or presentation. Being in the same physical space is a key distinction because it enables the nuances of nonverbal communication more than any other medium/channel combination. As Chapter 2 points out, these nonverbal signals can carry as much weight in a conversation as the words being spoken.

By giving people the ability to see, hear, and react to each other, in-person communication encourages people to ask questions, make comments, and work together to reach a consensus or decision. Managers in particular should embrace face-to-face contact because it can foster a more open and trusting style of communication with employees. In fact, the practice of putting down the digital tools and getting out of one's office to interact with staff has its own name—*management by walking around (MBWA)*.[2]

Oral Medium, Digital Channel

Oral media via digital channels include any transmission of voice via electronic means, both live and recorded, such as telephone calls, internet telephony (VoIP) services such as Skype, voicemail messages, and podcasts. Live phone conversations offer the give-and-take of in-person conversations and can be the best alternative to talking in person, although voice-only channels don't support all the nuances of nonverbal communication.

Written Medium, Print Channel

Memos are brief printed documents traditionally used for the routine, day-to-day exchange of information within an organization.

Letters are brief written messages sent to customers and other recipients outside the organization.

Written, printed documents are the classic format of business communication. **Memos** are brief printed documents traditionally used for the routine, day-to-day exchange of information within an organization. **Letters** are brief written messages sent to customers and other recipients outside the organization. Reports and proposals are usually longer

TABLE 4.1 Medium/Channel Combinations: Advantages and Disadvantages

Medium/Channel	Advantages	Disadvantages
Oral, in-person	• Provide opportunity for immediate feedback • Easily resolve misunderstandings and negotiate meanings • Involve rich nonverbal cues (both physical gestures and vocal inflections) • Allow you to express the emotion behind your message	• Restrict participation to those physically present • Unless recorded, provide no permanent, verifiable record of the communication • Can reduce communicator's control over the message
Oral, digital	• Can provide opportunity for immediate feedback (live phone or online conversations) • Not restricted to participants in the same location • Allow time-shifted consumption (podcasts, for example)	• Lack nonverbal cues other than voice inflections • Can be tedious to listen to if not audience focused (recorded messages such as podcasts)
Written, printed	• Allow writers to plan and control their messages • Can reach geographically dispersed audiences, although not as easily as digital • Offer a permanent, verifiable record • Can be used to avoid immediate interactions • Can deemphasize emotional elements • Give recipients time to process messages before responding (compared with oral communication and some digital formats)	• Offer limited opportunities for timely feedback • Lack the rich nonverbal cues provided by oral media • Often take more time and more resources to create and distribute • Can require special skills in preparation and production (elaborate documents)
Written, digital	In general, all the advantages of written printed documents plus: • Can be delivered quickly • Offer the flexibility of multiple formats and channels, from microblogs to wikis • Offer the ability to structure messages in creative ways, such as writing a headline on Twitter and linking to the full message on a blog • Can offer links to related and more in-depth information • Can increase accessibility and openness in an organization through broader sharing • Enable audience interaction through social media features • Can be easily integrated with other media types, such as embedded videos or photos	• Can be limited in terms of reach and capability (for instance, you need someone's email address before sending a message) • Require internet or mobile phone connectivity • Are easy to overuse (sending too many messages to too many recipients) • Create privacy risks and concerns (exposing confidential data, employer monitoring, accidental forwarding) • Entail security risks (viruses, spyware, network breaches) • Can create productivity concerns (frequent interruptions, nonbusiness usage)
Visual, printed	• Can convey complex ideas and relationships quickly • Are often less intimidating than long blocks of text • Can reduce the burden on the audience to figure out how the pieces of a message or concept fit	• Can require artistic skills to design (for complicated visuals) • Require some technical skills to create • Can require more time to create than equivalent amount of text • Can be expensive to print (large or elaborate pieces)
Visual, digital	In general, all the advantages of visual printed documents and all the advantages of written digital formats plus: • Can personalize and enhance the experience for audience members • Offer the persuasive power of multimedia formats, particularly video	• Require time, cost, and skills needed to create • Can require large amounts of bandwidth to distribute

than memos and letters, although both can be created in memo or letter format. These documents come in a variety of lengths, ranging from a few pages to several hundred, and are usually fairly formal in tone.

Digital media/channel formats have replaced printed documents in many instances, but print is still the best choice for some messages and situations.

Although still a useful format, printed documents have been replaced by digital alternatives in many instances. However, here are several situations in which you should consider a printed message over digital alternatives:

- When you want to make a formal impression
- When you are legally required to provide information in printed form
- When you want to stand out from the flood of digital messages
- When you need a permanent, unchangeable, or secure record

Obviously, if you can't reach an audience through digital channels, you'll need to use a printed message. Appendix A offers guidelines on formatting printed memos and letters.

Written Medium, Digital Channel

Most of your business communication efforts will involve written digital messages. Chapters 7 and 8 take a closer look at various written-digital combinations, from email to workgroup messaging to social networks.

Most of your business communication efforts will involve the combination of written medium and digital channel.

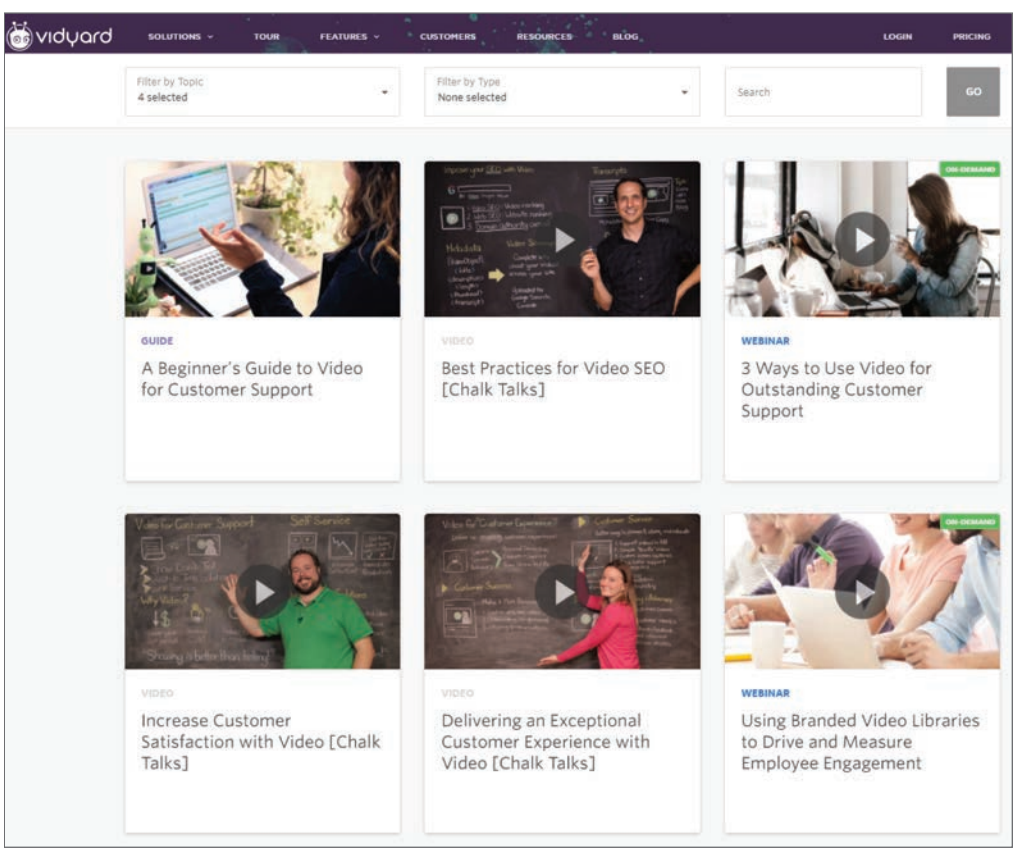
Visual Medium, Print Channel

Photographs and diagrams can be effective communication tools for conveying emotional content, spatial relationships, technical processes, and other content that can be difficult to describe using words alone. You may occasionally create visual, printed messages as standalone items, but most will be used as supporting material in printed documents.

Visual Medium, Digital Channel

Business messages can really come alive when conveyed by visual media in digital channels (see Figure 4.4). Infographics, interactive diagrams, animation, and digital video have the potential to engage audiences in ways that other formats can't, which is why the use of visual elements in business communication continues to grow.

The combination of the visual medium and a digital channel can be the most compelling and engaging choice for many messages, although it is not always the easiest or cheapest format.



vidyard.com

Figure 4.4 Media and Channel Choices
Vidyard, which helps businesses use online video for marketing, sales, and customer support, uses a variety of media to share its messages. To learn more about Vidyard and its services, potential clients can peruse the website, read blog posts, view webinars, read guides and handbooks, take online courses, and watch videos.

Traditional business messages rely primarily on text, with occasional support from graphics such as charts, graphs, or diagrams to help illustrate points discussed in the text. However, many business communicators are discovering the power of messages in which the visual element is dominant and supported by small amounts of text. For the purposes of this discussion, you can think of visual media as formats in which one or more visual elements play a central role in conveying the message content, such as with infographics (covered in Chapter 9).

Messages that combine powerful visuals with supporting text can be effective for several reasons. Today's audiences are pressed for time and bombarded with messages, so anything that communicates quickly is welcome. Visuals are also effective at describing complex ideas and processes because they can reduce the work required for an audience to identify the parts and relationships that make up the whole. Also, in a multilingual business world, diagrams, symbols, and other images can lower communication barriers by requiring less language processing. Finally, visual images can be easier to remember than purely textual descriptions or explanations.

The Unique Challenges of Communication on Mobile Devices

Mobile devices can be used to create and consume virtually every digital form of oral, written, and visual media. Thanks to the combination of portability and the flexibility enabled by a wide array of business-focused apps, mobile devices have become a primary tool in business communication. However, they do require some special considerations:

The mobile digital channel has become significant in business communication of all types, but it presents some challenges that must be considered.

- **Screen size and resolution.** The screen resolution of phones, phablets, and tablets has improved considerably in recent years, but the limited size of these screens still presents a challenge simply because many messages are significantly larger than the screens they will be viewed on. The result is a dilemma that pits clarity against context. Readers can zoom in to make text readable and visuals understandable but the inability to see an entire document page or visual at once can limit a reader's ability to grasp its full meaning. This can be particularly troublesome if you are collaborating on writing or presentation projects and team members need to review documents or slides.
- **Input technologies.** Even for accomplished texters, typing on mobile keyboards can be a challenge. Voice recognition is one way around the keyboard limitation, but anyone using it in public areas or shared offices runs the risk of sharing private content and annoying anyone within earshot. In addition, selecting items on a touch screen can be more difficult than doing so on a PC screen using a mouse or touchpad. If your website content or other messages and materials require a significant amount of input activity from recipients, try to make it as easy as possible for them. Even simple steps such as increasing the size of buttons and text-entry fields can help.
- **Bandwidth, speeds, and connectivity limitations.** The quality of mobile connectivity varies widely by device, carrier, service plan, roaming, and geographic location. Even users with higher-bandwidth service don't always get the advertised transfer speeds they are paying for. Moreover, mobile users can lose connectivity while traveling, while passing through network "dead spots," or during peak-demand hours or events (trade shows and conventions are notorious for this). Don't assume that your mobile recipients will be able to satisfactorily consume the content that you might be creating on a fast, reliable, in-office network. Reducing the size of photos and other media elements on webpages is a good way to speed up access for mobile users.[3]
- **Data usage and operational costs.** As the amount of video traffic in particular increases (video requires much higher bandwidth than text or audio), data consumption is becoming a key concern for mobile carriers and customers alike. In

the United States, mobile costs could be affected by developments in *net neutrality* regulations, which determine whether carriers need to treat all network data equally.[4]

FACTORS TO CONSIDER WHEN CHOOSING MEDIA AND CHANNELS

You don't always have the option of choosing which medium or channel to use. For example, many companies have workgroup messaging or social networking systems that you are expected to use for certain types of communication. However, when you do have a choice, consider these factors:

- **Richness.** *Richness* is a medium's ability to (1) convey a message through more than one informational cue (including images, sounds, words, tone of voice, and nonverbal signals), (2) facilitate feedback, (3) establish personal focus, and (4) allow the use of natural, conversational language.[5] Face-to-face communication is a rich medium because it excels in all four of these areas: It delivers information both verbally and nonverbally, it allows immediate feedback through both verbal and nonverbal responses, it has the potential to be intimate and personal, and it lets people converse naturally. In contrast, lean media are limited in one or more of these four aspects. For example, texting and instant messaging allow rapid feedback and can easily be personalized. However, they usually deliver information through only one informational cue (words), which can lead to misinterpretation, although emoticons and emojis (see page 194) can add emotional nuances. In general, use richer media to send nonroutine or complex messages, to humanize your presence throughout the organization, to communicate caring to employees, and to gain employee commitment to company goals. Use leaner media to send routine messages or to transfer information that doesn't require significant explanation.[6]

  Media vary widely in terms of *richness*, which encompasses the number of information cues, feedback mechanisms, and opportunities for personalization.

- **Formality.** Your medium/channel choice is itself a nonverbal signal that affects the style and tone of your message. For example, a printed memo or letter is likely to be perceived as a more formal gesture than an email message.
- **Media and channel limitations.** Every medium and channel has limitations. For instance, short messaging services are perfect for communicating simple, straightforward messages between two people, but they are less effective for complex messages or conversations that involve three or more people.
- **Urgency.** Some media establish a connection with the audience faster than others, so choose wisely if your message is urgent. However, be sure to respect audience members' time and workloads. If a message isn't urgent and doesn't require immediate feedback, choose a medium such as email that allows people to respond at their convenience.

  Many types of media/channel combinations offer instantaneous delivery, but take care not to interrupt people unnecessarily if you don't need an immediate answer.

- **Cost.** Cost is both a real financial factor and a perceived nonverbal signal. For example, depending on the context, extravagant video or multimedia presentations can send a nonverbal signal of sophistication and professionalism—or careless disregard for company budgets.

  Remember that media and channel choices can also send a nonverbal signal regarding costs; make sure your choices are financially appropriate.

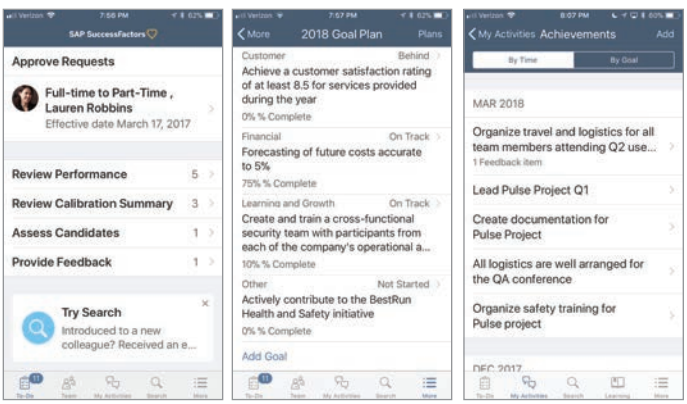
- **Audience preferences.** If you know that your audience prefers a particular medium/channel combination, use that format if it works well for the message and the situation. Otherwise, you risk annoying the audience or having your message missed or ignored.
- **Security and privacy.** Your company may have restrictions on the media and channels that can be used for certain types of messages, but even if it doesn't, think carefully whenever your messages include sensitive information. Never assume that your digital communications are private. Many companies monitor employee communication on these channels, and there is always the risk that networks could get hacked or that messages will be forwarded beyond their original recipients.

  Always be aware of your company's policies regarding network security and data privacy.

BUSINESS COMMUNICATORS INNOVATING WITH MOBILE

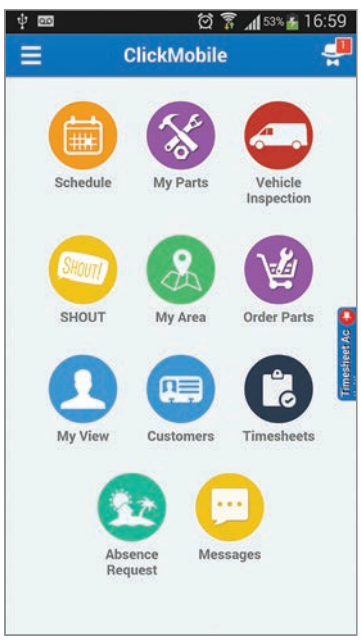
Mobile connectivity is freeing employees and managers from the constraints of fixed location, making it easier to communicate and collaborate with teams and business partners wherever their work takes them. Here are a few of the ways companies are using mobile technology to improve communication.

Employee performance management apps help supervisors plan workforce needs, keep track of employee progress, and quickly address workplace issues.



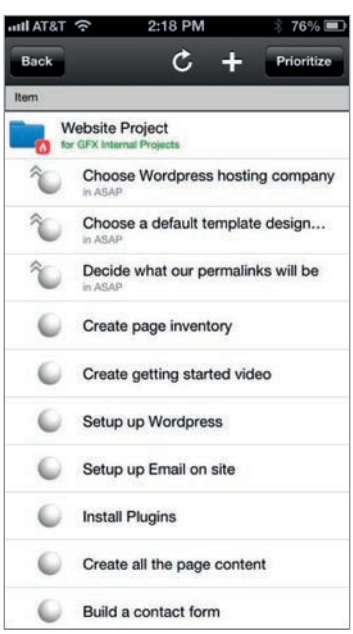
Courtesy of SAP SuccessFactors

Distributed decision-making apps give employees the tools to make decisions in the field, without being forced to wait for managers back in the office. Being able to make decisions on the spot improves customer service and company responsiveness in dealing with opportunities or crises.



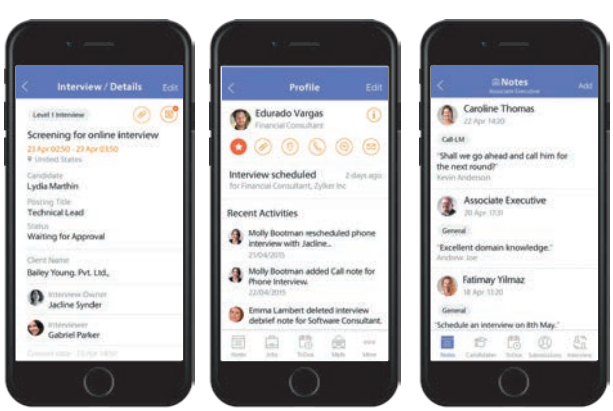
Images supplied courtesy of ClickSoftware Technologies, Ltd., © 2013–2015. All rights reserved.

Project management apps help mobile and geographically dispersed work teams collaborate. Instant access to task status and other vital information helps project managers stay on top of rapidly moving projects and helps team members communicate efficiently.



Courtesy of LiquidPlanner, Inc.

Employee recruiting apps give recruiters the tools they need to screen candidates and manage the entire interview process.



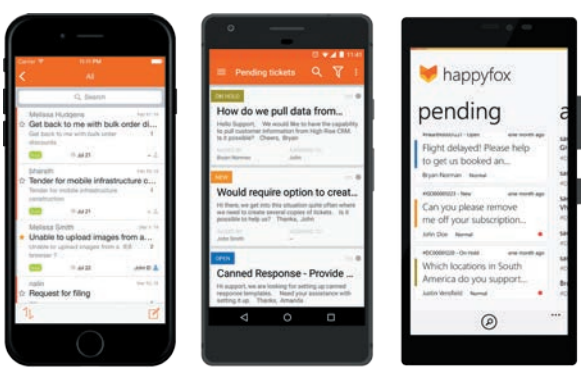
Courtesy of Zoho Corporation

Travel and expense tracking apps help employees and managers organize the details of business travel and write expense reports, trip reports, and other required communications.



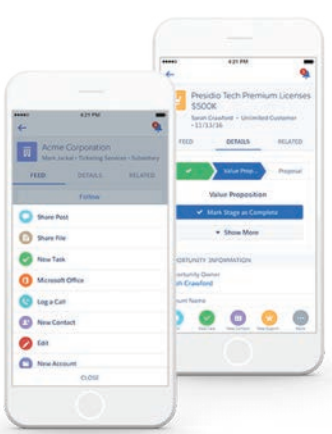
Source: Expensify

Customer support apps give mobile employees access to trouble tickets, customer records, troubleshooting tools, messaging, and other resources they need to solve problems on site.



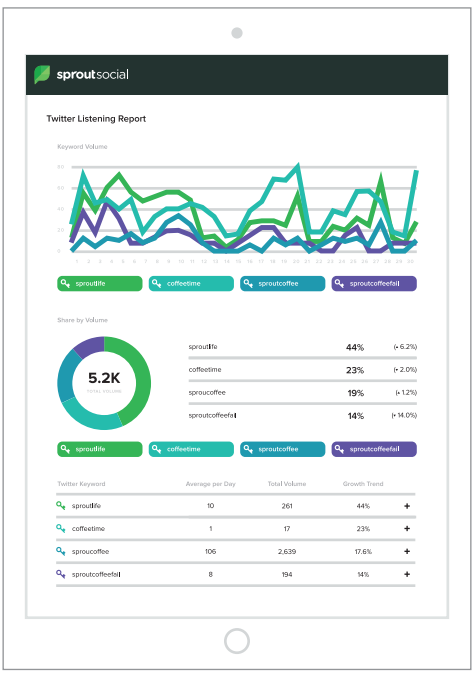
Courtesy of HappyFox

Sales apps give sales representatives the resources they need to find and qualify sales prospects, present solutions, give product demonstrations, take orders, and sign contracts.



Source: 2018 Salesforce.com, Inc. Used with permission

Social media management apps such as Sprout Social help social media managers stay on top of Twitter, Facebook, and other feeds so they can respond to breaking news, customer complaints, rumors, and other events that require fast response around the clock.



Courtesy of Sprout Social

Unified communication apps pull together the multiple channels that many employees now need to coordinate—phone, messaging, email, videoconferencing, social media feeds, and more.



Source: Mitel

Organizing Your Information

5 LEARNING OBJECTIVE
Explain why good organization is important to both you and your audience, and list the tasks involved in organizing a message.

The ability to organize messages effectively is a skill that helps audiences and writers alike. Good organization helps the receivers of your message in three ways:

Good organization benefits your audiences by helping them understand and accept your message in less time.

- **It helps them understand your message.** In a well-organized message, you make your main point clearly, provide additional points to support that main idea, and satisfy all the information needs of the audience. But if your message is poorly organized, your meaning can be obscured, and your audiences may form inaccurate conclusions about what you've written or said.
- **It helps them accept your message.** If your writing appears confused and disorganized, people will likely conclude that the *thinking* behind the writing is also confused and disorganized. Moreover, effective messages often require more than just clear logic. In sensitive situations, for example, a thoughtful and diplomatic approach helps receivers accept your message, even if it's not exactly what they want to hear. In contrast, a poorly organized message on an emotionally charged topic can alienate the audience before you have the chance to get your point across.
- **It saves your audience time.** Well-organized messages are efficient. They contain only relevant ideas, and they are brief. Moreover, each piece of information is presented in a logical place in the overall flow; each section builds on the one before to create a coherent whole without forcing people to look for missing pieces.

Good organization helps you by reducing the time and creative energy needed to create effective messages.

In addition to saving time and energy for your readers, good organization saves *you* time and consumes less of your creative energy. The writing moves more quickly because you don't waste time putting ideas in the wrong places or composing material that you later discover you don't need. You spend far less time rewriting, trying to extract sensible meaning from disorganized rambling. Plus, organizational skills are good for your career because they help you develop a reputation as a clear thinker who cares about your readers.

DEFINING YOUR MAIN IDEA

The *topic* is the overall subject of a message; the *main idea* makes a statement about the topic.

The **topic** of your message is the overall subject, and your **main idea** is a specific statement about that topic (see Table 4.2). For example, if you believe that the current system of using paper forms for filing employee insurance claims is expensive and slow, you might craft a message in which the topic is employee insurance claims and the main idea is that a new web-based system would reduce costs for the company and reduce reimbursement delays for employees.

In longer documents and presentations, you sometimes need to unify a mass of data and information under one main idea that encompasses all the individual points you want to make. Finding a common thread through all these points can be a challenge. Sometimes you won't even be sure what your main idea is until you sort through the information. For tough assignments like these, consider a variety of techniques to define your main idea:

If your main idea isn't clear, try multiple creative approaches to clarify and refine it.

- **Brainstorming.** Working alone or with others, generate as many ideas and questions as you can, without stopping to criticize or organize. After you capture all these pieces, look for patterns and connections to help identify the main idea and groups of supporting ideas.

TABLE 4.2 Defining Topic and Main Idea

General Purpose	Example of Specific Purpose	Example of Topic	Example of Main Idea
To inform	Teach customer service representatives how to edit and expand the technical support wiki	Technical support wiki	Careful, thorough edits and additions to the wiki help the entire department provide better customer support.
To persuade	Convince top managers to increase spending on research and development	Funding for research and development	Competitors spend more than we do on research and development, which helps them create more innovative products.
To collaborate	Solicit ideas for a companywide incentive system that ties wages to profits	Incentive pay	Tying wages to profits motivates employees and reduces compensation costs in tough years.

- **Journalistic approach.** The journalistic approach (see page 105) can help you distill major ideas from unorganized information.
- **Question-and-answer chain.** Start with a key question from the audience's perspective, and work back toward your message. You will probably find that each answer generates new questions until you identify the information that needs to be in your message.
- **Storyteller's tour.** Some writers find it best to talk through a communication challenge before they try to write. Record yourself as you describe what you intend to write. Then listen to the playback, identify ways to tighten and clarify the message, and repeat the process until you distill the main idea down to a single concise message.
- **Mind mapping.** You can generate and organize ideas using a graphic method called *mind mapping* (see Figure 4.5). Start with a main idea and then branch out to connect every other related idea that comes to mind.

LIMITING YOUR SCOPE

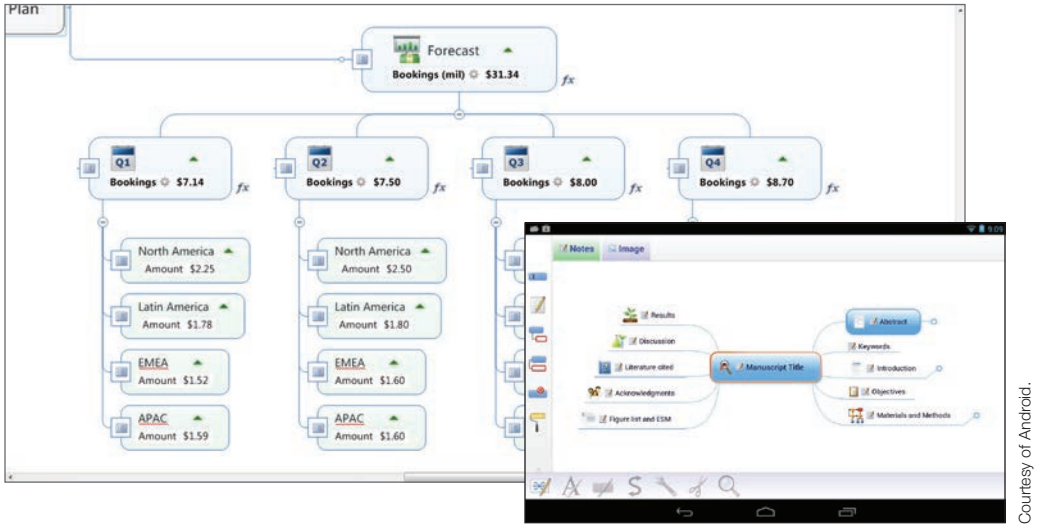
The *scope* of a message is the range of information it presents, its overall length, and the level of detail.

Limit the scope of your message so that you can convey your main idea as briefly as possible.

The **scope** of your message is the range of information you present, the overall length, and the level of detail—all of which need to correspond to your main idea. The length of some business messages has a preset limit, whether from a boss's instructions, the medium/channel you're using, or a time frame (such as speaker slots during a seminar). Even if you don't have a preset length, always limit yourself to the scope needed to convey your main idea and whatever supporting information it requires.

Whatever the length of your message, limit the number of major supporting points to the most compelling and important ideas. Offering a long list of supporting points might feel as though you're being thorough, but your audience is likely to view such detail as rambling and mind numbing. If you have quite a few valid points, look for ways to combine them to create a smaller number with greater impact. For instance, you can group points under major headings such as finance, customers, competitors, employees, or whatever is appropriate for your subject.

The ideal length of a message depends on your topic, your audience members' familiarity with the material, their receptivity to your conclusions, and your credibility. You'll need less content to present routine information to a knowledgeable audience that already knows and trusts you. You'll need more content to build a consensus about a complex and controversial subject, especially if the members of your audience are skeptical or hostile.



Courtesy of Android.

Figure 4.5 Mind Mapping
Mind-mapping tools such as Mindjet Map make it easy to explore the organization of your material, and mobile apps (see inset) bring this capability to tablets and other mobile devices.

CHOOSING BETWEEN DIRECT AND INDIRECT APPROACHES

With the *direct approach*, you open with the main idea of your message and support it with reasoning, evidence, and examples.

With the *indirect approach*, you withhold the main idea until you have built up to it logically and persuasively with reasoning, evidence, and examples.

The indirect approach is primarily used for messages that address skeptical or hostile audiences, that need to convey significant negative information, or that attempt to persuade an audience.

After you've defined your main idea and supporting points, you're ready to decide on the sequence you will use to present your information. You have two basic options:

- The **direct approach** starts with the main idea (such as a recommendation, a conclusion, or a request) and follows that with supporting points and evidence.
- The **indirect approach** starts with reasoning, evidence, and background information and builds up to the main idea.

Most of your routine business communication efforts will use the direct approach. The indirect approach is most frequently used in three situations: (1) when your audience is likely to have a skeptical or hostile reaction to your main idea, (2) when you need to convey significantly negative information, or (3) when you want to persuade people to take action or make a decision.

- With skeptical or hostile audiences, if you open with the main idea, readers or listeners are likely to react in an emotionally defensive way and be more resistant to your reasons and evidence. They already have concerns about the subject, and you're not yet giving them any reason to think otherwise. However, if you lay out your reasons and evidence first, there's a better chance they will process these points before you get to the main idea.
- For negative messages, the indirect approach lets you present reasons for the negative news before you actually state it. Doing so can ease the shock for readers or listeners because it gives them time to emotionally prepare for the news rather than being hit with it right away. If it is used thoughtfully and ethically, the indirect approach can be a sensitive way to share unwelcome news. Chapter 11 discusses negative messages in detail and offers advice to help you choose when to use the indirect approach for these messages.
- With persuasive messages, you are usually asking readers or listeners to make a decision or take action. The indirect approach lets you build toward your request with compelling reasons and evidence so that by the time you make the request, the audience is more likely to be on your side. Chapter 12 discusses persuasive messages in more detail.

OUTLINING YOUR CONTENT

Outlining saves time and helps you create more effective messages.

After you have chosen the best approach, it's time to figure out the most logical and effective way to present your major points and supporting details. For anything beyond simple, short messages, get into the habit of creating outlines. You'll save time, get better results, and do a better job of navigating through complicated business situations. Even if you're just jotting down three or four key points, making an outline will help you organize your thoughts for faster writing. When you're preparing longer, more complex documents and presentations, an outline is indispensable because it helps you visualize the relationships among the various parts.

You're no doubt familiar with the basic outline formats that identify each point with a number or letter and that indent certain points to show which ones are of equal status. A good outline divides a topic into at least two parts, restricts each subdivision to one category, and ensures that each subdivision is separate and distinct (see Figure 4.6).

MOBILE APP

Outliner is one of several apps that make it easy to create and modify outlines.

Another way to visualize the outline of your message is to create an organization chart similar to the charts used to show a company's management structure. Put the main idea in the highest-level box to establish the big picture. The lower-level ideas, like lower-level employees, provide the details. All the ideas should be logically organized into divisions of thought, just as a company is organized into divisions and departments.[7] The mind-mapping technique used to generate ideas works in a similar way, although after you complete your map, you still need to decide the order in which to present the various branches.

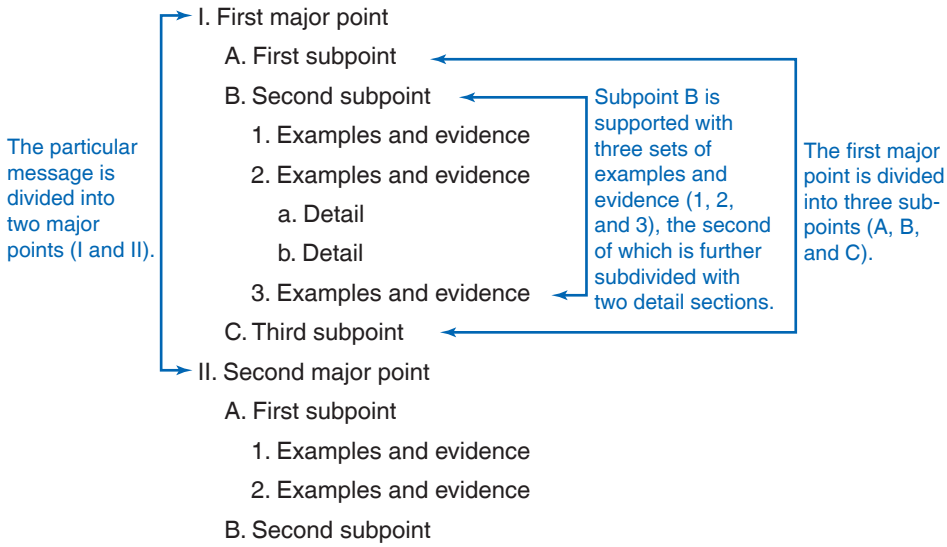


Figure 4.6 Organizing Your Thoughts with a Clear Outline
No matter what outlining format you use, think through your major supporting points and the examples and evidence that can support each point.

Whichever outlining or organizing scheme you use, be sure to identify your main idea, major supporting points, and the evidence and examples that will help you express the main idea in a compelling way. (Keep in mind that the order in which you present these elements in your message depends on whether you are using the direct or indirect approach.)

Identify the Main Idea

The main idea establishes *what* you want your readers to do or think and *why* it is beneficial for them to do so.

The main idea helps you establish the goals and general strategy of the message, and it summarizes two vital considerations: (1) *what* you want your audience members to do or think and (2) *why* it is beneficial for them to do so. Everything in your message should either support the main idea or explain its implications. Remember that the direct approach states the main idea in the opening of the message, whereas the indirect approach delays the main idea until after the evidence is presented.

Assemble Major Supporting Points

Your main idea needs supporting points that clarify and explain it in concrete terms.

For anything beyond simple messages, you need to support your main idea with major points that clarify and explain the main idea in concrete terms. If your purpose is to inform and the material is factual, your major points may be based on something physical or financial—something you can visualize or measure, such as activities to be performed, functional units, spatial or chronological relationships, or parts of a whole. If you're describing a process, the major points are usually steps in the process. If you're describing an object, the major points often correspond to the parts of the object. If you're giving a historical account, major points represent events in the chronological chain of events. If your purpose is to persuade or to collaborate, select major points that develop a line of reasoning or a logical argument that proves your central message and motivates your audience to act.

Gather Compelling Examples and Evidence

Choose examples and evidence carefully; one compelling story or piece of evidence can be stronger than a collection of weaker material.

After you've defined the main idea and identified major supporting points, think about examples and evidence that can confirm, illuminate, or expand on your supporting points. Choose examples and evidence carefully so that these elements support your overall message without distracting or overwhelming your audience. One strong example, particularly if it is conveyed through a compelling story (see the next section), is usually more powerful than several weaker examples. Similarly, a few strong points of

TABLE 4.3 Six Types of Detail

Type of Detail	Example	Comment
Facts and figures	Sales are strong this month. We have two new contracts worth $5 million and a good chance of winning another worth $2.5 million.	Enhance credibility more than any other type, but can become tedious if used excessively.
Example and illustrations	We've spent four months trying to hire recent accounting graduates, but so far, only one person has joined our firm. One candidate told me that she would love to work for us, but she can get $10,000 more a year elsewhere.	Add life to a message, but an example doesn't necessarily prove a point. The main idea must be supported by other evidence as well.
Description	Upscale hamburger restaurants target burger lovers who want more than the convenience and low prices of a fast-food burger. These places feature more adventuresome menus, a greater range of toppings, and a more sophisticated atmosphere.	Helps audience visualize the subject by creating a sensory impression. Doesn't prove a point but clarifies it and makes it memorable.
Narration (storytelling)	When Rita Longworth took over as CEO, she faced a tough choice: shut down the tablet PC division entirely or outsource manufacturing to lower costs while keeping the division alive. As her first step, she convened a meeting with all the managers in the division to get their input on the two options. (Story continues from there.)	Stimulates audience interest through the use of dramatic tension. In many instances, must be supplemented with statistical data to prove a point convincingly.
Reference to authority	I discussed this idea with Jackie Loman in the Chicago plant, and she was very supportive. As you know, Jackie has been in charge of that plant for the past six years. She is confident that we can speed up the number 2 line by 150 units an hour if we add another worker.	Bolsters a case while adding variety and credibility. Works only if authority is recognized and respected by audience.
Visual aids	Graphs, charts, tables, infographics, data visualization, photos, video	Help audiences grasp the key points about sets of data or visualize connections between ideas.

evidence are usually more persuasive than a large collection of minor details. You can back up your major supporting points in a variety of ways, depending on the subject material and the available examples and evidence (see Table 4.3).

Figure 4.7 illustrates several of the key themes about organizing a message: helping readers get the information they need quickly, defining and conveying the main idea, limiting the scope of the message, choosing the approach, and outlining your information.

BUILDING READER INTEREST WITH STORYTELLING TECHNIQUES

Storytelling is an effective way to organize many business messages because it helps readers personalize the message and understand causes and consequences.

As the Wolff Olins story at the beginning of the chapter points out, narrative techniques can be an effective way to organize messages in a surprising number of business situations, from recruiting and training employees to enticing investors and customers. Storytelling is such a vital means of communicating that, in the words of management consultant Steve Tobak, "It's hard to imagine your career going anywhere if you can't tell a story."[8] Fortunately, you've been telling and hearing stories all your life, so narrative techniques already come naturally to you; now it's just a matter of adapting those techniques to business situations.

Career-related stories, such as how someone pursued the opportunity to work on projects he or she is passionate about, can entice skilled employees to consider joining a firm. Entrepreneurs can use stories to help investors see how their new ideas have the potential to affect people's lives (and therefore generate lots of sales). Stories can be cautionary tales as well, dramatizing the consequences of career blunders, ethical mistakes, or strategic missteps.



Figure 4.7 Improving the Organization of a Message
This writer is following up on a conversation from the previous day, in which he and the recipient discussed which of two forms of ownership, a partnership or a corporation, they should use for their new company. (*Partnership* has a specific legal meaning in this context.) That question is the topic of the message; the main idea is the recommendation that they incorporate rather than form a partnership. Notice how the Effective version uses the direct approach to quickly get to the main idea and then supports that by comparing the advantages and disadvantages of both forms of ownership. In contrast, the Ineffective version contains irrelevant information, makes the comparison difficult to follow, and buries the main idea in the middle of the message.

The Power of Story

A key reason storytelling can be so effective is that stories help readers and listeners imagine themselves living through the experience of the person in the story. Chip Heath of Stanford University and his brother, Dan Heath of Duke University, spent years exploring the question of why some ideas "stick" and others disappear. One of

their conclusions is that ideas conveyed through storytelling tend to thrive because stories "put knowledge into a framework that is more lifelike, more true to our day-to-day existence."[9]

Stories can demonstrate cause-and-effect relationships in a compelling way.

In addition, stories can demonstrate cause-and-effect relationships in a compelling fashion.[10] Imagine attending a new employee orientation and listening to the trainer read off a list of ethics rules and guidelines. Now imagine the trainer telling the story of someone who sounded a lot like you, fresh out of college and full of energy and ambition. Desperate to hit demanding sales targets, the person in the story began logging sales before customers had agreed to purchase, hoping the sales would eventually come through and no one would be the wiser. However, the scheme was exposed during a routine audit, and the rising star was booted out of the company with an ethical stain that would haunt him for years. You may not remember all the rules and guidelines, but chances are you will remember what happened to that person who sounded a lot like you at the beginning of the story. This ability to share organizational values is one of the major benefits of using storytelling in business communication, particularly across diverse workforces.[11]

Stories can also help leaders and employees envision future possibilities, such as new product concepts or different ways of approaching work. In these instances, storytelling can free people from the mental constraints of how things are now. By asking "what if . . .?" questions and describing appealing future conditions in the context of a story, storytellers can help people imagine how things could be, even if today's facts, figures, and assumptions don't paint an obvious path toward that future.[12]

INTELLIGENT COMMUNICATION TECHNOLOGY

Shaping Stories with the Help of Artificial Intelligence

To outsiders, storytelling, music composition, and other creative endeavors might seem like vaguely magical or mystical activities in which naturally gifted people conjure stories, symphonies, and other art forms out of thin air. However, many artists will likely tell you that in reality it's a little bit of magic and a whole lot of work.

Creation involves a process that is more method than mystery: Understand the structure of what you're trying to create (such as the emotional arc of stories), play around with lots of possibilities, and then decide which of those possibilities fit the structure in the most effective way. Obviously, it takes original vision to come up with possibilities and finely tuned insights to know what will resonate with readers or viewers, but there is a method to it.

The existence of any process suggests the possibility of automating one or more steps in the process, and developers are busy applying AI to the storytelling process. For example, storytelling is most engaging when it connects with an audience's desires, dreams, or fears. By using tools such as *social listening* (monitoring social media feeds), advertisers can take the emotional pulse of a target audience to identify storytelling angles that people are more likely to respond to. AI tools can also tell businesses whether the stories they're telling are hitting the mark. In terms of actually creating content, AI systems write many of the simple news and sports stories published today.

Will AI ever write complex, nuanced stories that match the skill and touch of accomplished human writers? At this point, that seems far-fetched, given how vital the human traits of empathy and emotional intelligence are in storytelling. A human-machine partnership looks like the best possibility for the foreseeable future, with each partner focusing on his, her, or its greatest strengths. Computers can do the data crunching and some of the "grunt work" in terms of putting simple stories together, and humans can spend their time being even more creative.

WHAT'S YOUR TAKE?

1. How do you feel about companies using AI to analyze your social media content to get an idea of what you're thinking and feeling?
2. Would you feel differently about an enjoyable novel or movie if you learned it had been written by an AI system? Why or why not?

Sources: Enrique Dans, "Meet Bertie, Heliograf and Cyborg, the New Journalists on the Block," *Forbes*, 6 February 2019, www.forbes.com; Eric Chu, Jonathan Dunn, Deb Roy, Geoffrey Sands, and Russell Stevens, "AI in Storytelling: Machines as Cocreators," McKinsey, December 2017, www.mckinsey.com; Darren Menabney, "Why Google, Ideo, and IBM Are Betting on AI to Make Us Better Storytellers," *Fast Company*, 6 February 2017, www.fastcompany.com; Zohar Dayan, "Artificial Intelligence: A Complement to Great Storytelling," *Forbes*, 11 December 2017, www.forbes.com.

The Three Elements of Storytelling

A classic story has three basic parts. The beginning of the story presents someone whom the audience can identify with in some way, and this person has a dream to pursue or a problem to solve. (Think of how movies and novels often start by introducing a likable character who immediately gets into danger, for example.) The middle of the story shows this character taking action and making decisions as he or she pursues the goal or tries to solve the problem. The storyteller's objective here is to build the audience's interest by increasing the tension: Will the "hero" overcome the obstacles in his or her path and defeat whatever adversary is keeping him or her away from the goal?[13] The end of the story answers that question and usually offers a lesson to be learned about the outcome as well.

Organize stories in three parts:
- A beginning that introduces a sympathetic person with a dream or a challenge
- A middle that shows the obstacles to be overcome
- An ending that resolves the situation and highlights the moral or message of the story

By the way, even though these are "stories," they must not be made-up tales. Telling stories that didn't happen while presenting them as real-life events is a serious breach of ethics.[14]

Consider adding an element of storytelling whenever your main idea involves the opportunity to inspire, to persuade, to teach, or to warn readers or listeners about the potential outcomes of a particular course of action.

For a quick refresher on message-planning tasks, see "Checklist: Planning Business Messages."

CHECKLIST ✓ Planning Business Messages

A. Analyze the situation.
- Determine whether the purpose of your message is to inform, persuade, or collaborate.
- Identify what you want your audience to think or do after receiving the message.
- Make sure your purpose is worthwhile and realistic.
- Make sure the time is right for your message.
- Make sure your purpose is acceptable to your organization.
- Identify the primary audience.
- Determine the size and composition of your audience.
- Estimate your audience's level of understanding and probable reaction to your message.

B. Gather information.
- Decide whether to use formal or informal techniques for gathering information.
- Figure out what your audience needs to know.
- Provide all required information, and make sure it's accurate, ethical, and pertinent.

C. Select the best combination of medium and channel for your message.
- Understand the advantages and disadvantages of oral, written, and visual media distributed through both digital and nondigital channels.
- Consider media richness, formality, media limitations, urgency, cost, and audience preference.

D. Organize your information.
- Define your main idea.
- Limit your scope.
- Choose the direct or indirect approach.
- Outline content by defining your main idea, identifying major supporting points, and gathering examples and evidence.
- Look for opportunities to use storytelling to build audience interest.

COMMUNICATION CHALLENGES AT Wolff Olins

You've joined the Wolff Olins team at the company's New York office, where you work as a creative consultant helping entrepreneurs and company leaders write and tell stories. Use what you've learned in this chapter to address these two challenges.

INDIVIDUAL CHALLENGE: Look ahead to "Writing the Story of You" on page 519 in Chapter 18. You've been asked to write your career story as an example that Wolff Olins can use to teach clients about applying storytelling in a business context. If you are already established in your career, you can tell the story of how you got to where you are now, or you can imagine a fictitious career or a path you didn't take and write that story. If you have yet to start your business career, visualize where you'd like to be in 20 or 25 years and imagine the steps it would take to get there. Write your story in 150 to 200 words, making up whatever details you need. Be as creative as you want, and feel free to make your story a cautionary tale if you'd prefer—as in "don't make the mistakes I made."

TEAM CHALLENGE: With a team assigned by your instructor, research a product or product category that used to be extremely popular but is now much rarer or perhaps even off the market. It could be something long gone, such as horse-drawn carriages or hoop skirts, or it might be something more recent, such as the Sony Walkman portable cassette player or floppy disks. Find out why it was initially popular, how big it was during its heyday, and why it fell into decline. Using whatever medium/channel combination your instructor asks, tell the story of this product or product category from introduction to decline, pointing out lessons that future businesspeople should take to heart.

Key Terms

direct approach Message organization that starts with the main idea (such as a recommendation, a conclusion, or a request) and follows that with your supporting evidence

free writing An exploratory technique in which you write whatever comes to mind, without stopping to make any corrections, for a set period of time

general purpose The broad intent of a message—to inform, to persuade, or to collaborate with the audience

indirect approach Message organization that starts with the evidence and builds your case before presenting the main idea

journalistic approach Method of verifying the completeness of a message by making sure it answers the *who, what, when, where, why*, and *how* questions regarding an event or subject

letters Brief written messages sent to customers and other recipients outside the organization

main idea A specific statement about the topic of a message

memos Brief printed documents traditionally used for the routine, day-to-day exchange of information within an organization

scope The range of information presented in a message, its overall length, and the level of detail provided

specific purpose Identifies what you hope to accomplish with your message and what your audience should do or think after receiving your message

topic The overall subject of a message

Summary of Learning Objectives

1 Describe the three-step writing process. (1) Planning consists of four tasks: analyzing the situation (defining your purpose and profiling your audience), gathering the information to meet your audience's needs, selecting the best combination of medium and channel for the message and the situation, and organizing the information (defining your main idea, limiting your scope, selecting an approach, and outlining your content). (2) The writing step consists of two tasks: adapting to your audience and composing the message. Adapt your message to your audience by being sensitive to audience needs, building a strong relationship with your audience, and controlling your style. Compose your message by drafting your thoughts with strong words, effective sentences, and coherent paragraphs. (3) Completing your message consists of four tasks: revising your message by evaluating content and then rewriting and editing for clarity and conciseness, producing your message by using effective design elements and suitable delivery methods, proofreading your message for mistakes in spelling and mechanics, and distributing it in a way that meets both your needs and your audience's needs.

2 Explain why it's important to analyze a communication situation in order to define your purpose and profile your audience before writing a message. You must know enough about your purpose to shape your message in a way that will achieve your goal. Moreover, without a clear purpose to guide you, you are bound to waste time and energy. To decide whether you should proceed with your message, answer four questions: (1) Will anything change as a result of this message? (2) Is my purpose realistic? (3) Is this the right time for this message? (4) Is the purpose acceptable to my organization? Developing an audience profile is also essential because doing so helps you identify the information you need to include in your message and the most effective way to structure your message.

3 Discuss information-gathering options for simple messages, and identify three attributes of quality information. Gathering the information that will fulfill your audience's needs is a vital step before you attempt to organize your content. For more complex documents, you may need to plan a research project to acquire all the necessary information. For simple messages, however, if you don't already have all the information you need, you can often gather it by using informal methods such as considering the audience's perspective, reading existing reports and other company documents, talking with supervisors and others who have information and insight, and asking your audience members directly for their input. To determine whether the information you've gathered is good enough, verify that it is accurate, ethical, and pertinent to the audience's needs.

4 List the factors to consider when choosing the most appropriate medium for a message. The first factor to consider is media richness, which is a medium's ability to (1) convey a message using more than one informational cue (including images, sounds, words, tone of voice, and nonverbal signals), (2) facilitate feedback, (3) establish personal focus, and (4) allow the use of natural, conversational language. Other factors to consider when selecting media include the level of formality, the specific limitations of each medium, the level of urgency, the cost of various media options, and your audience's preferences.

5 Explain why good organization is important to both you and your audience, and list the tasks involved in organizing a message. When you organize messages carefully, you save time and conserve creative energy because the writing process is quicker and you spend less time rewriting. Good organization also helps your audience members understand your message, helps them accept your message, and saves them time. The tasks involved in organizing your message include defining your main idea, limiting your scope to the information needed to convey and support that main idea, choosing the direct or indirect approach, and then outlining your content.

Test Your Knowledge

To review chapter content related to each question, refer to the indicated Learning Objective.

4-1. What are the three major steps in the writing process? [LO-1]

4-2. What are the benefits of planning your messages carefully, particularly longer and more complex messages? [LO-1]

4-3. What two types of purposes do all business messages have? [LO-2]
4-4. What do you need to know to develop an audience profile? [LO-2]
4-5. What is the value of free writing and other discovery techniques? [LO-3]
4-6. Why are in-person conversations considered a rich medium? [LO-4]
4-7. What are four potential disadvantages of written, printed messages? [LO-4]
4-8. How does the topic of a message differ from its main idea? [LO-5]
4-9. Why is it important to limit the scope of every message? [LO-5]
4-10. What three elements do you need to consider when choosing between the direct and indirect approaches? [LO-5]

Apply Your Knowledge

To review chapter content related to each question, refer to the indicated Learning Objective.

4-11. How should you schedule your time for a writing project in an unfamiliar subject area when you have no idea how long it will take to complete the research and produce a first draft? [LO-1]
4-12. A day after sending an email to all 1,800 employees in your company regarding income tax implications of the company's retirement plan, you discover that one of the sources you relied on for your information plagiarized from other sources. You quickly double-check all the information in your message and confirm that it is accurate. However, you are concerned about using plagiarized information, even though you did nothing wrong. Write a brief email message to your instructor, explaining how you would handle the situation. [LO-3]
4-13. You are organizing an exploratory in-person meeting with engineering representatives from a dozen manufacturers around the world to discuss updates to a technical standard that all the companies' products must adhere to. The representatives have a wide range of firmly held opinions on the subject because the changes could help some companies and hurt others. They can't even agree on what should be addressed in the first meeting, so you need to develop a minimum level of consensus on what should be on the agenda. Which combination of media and channels would you use to move the conversation forward and finalize the agenda? Each company has one representative, and any discussions need to be kept confidential. [LO-4]
4-14. How might the inability to view an entire document at once on a mobile screen hinder a reader's ability to grasp the full meaning of the message? [LO-4]
4-15. Email lacks both the visual element and the instantaneous connection of some other media. Could these supposed shortcomings help some employees communicate more comfortably and effectively? Explain your answer. [LO-4]
4-16. Would you use the direct or indirect approach to ask employees to work overtime to meet an important deadline? Please explain. [LO-5]
4-17. You have been invited to speak at an annual industry conference. After preparing the outline for your presentation, you see that you've identified 14 different points to support your main idea. Should you move ahead with creating the slides for your presentation or move back and rethink your outline? Why? [LO-5]

Practice Your Skills

Message for Analysis

4-18. **Outlining Your Content [LO-5]** A writer working on an insurance information brochure is having trouble grouping the ideas logically into an outline. Using the following information, prepare the outline, paying attention to the appropriate hierarchy of ideas. If necessary, rewrite phrases to make them all consistent.

Accident Protection Insurance Plan

- Coverage is only pennies a day
- Benefit is $100,000 for accidental death on common carrier
- Benefit is $100 a day for hospitalization as a result of a motor vehicle or common carrier accident
- Benefit is $20,000 for accidental death in motor vehicle accident
- Individual coverage is only $17.85 per quarter; family coverage is just $26.85 per quarter
- No physical exam or health questions
- Convenient payment—billed quarterly
- Guaranteed acceptance for all applicants
- No individual rate increases
- Free, no-obligation examination period
- Cash paid in addition to any other insurance carried
- Covers accidental death when riding as fare-paying passenger on public transportation, including buses, trains, jets, ships, trolleys, subways, or any other common carrier
- Covers accidental death in motor vehicle accidents occurring while driving or riding in or on automobiles, trucks, campers, motor homes, or nonmotorized bicycles

Exercises

Each activity is labeled according to the primary skill or skills you will need to use. To review relevant chapter content, you can refer to the indicated Learning Objective. In some instances, supporting information will be found in another chapter, as indicated.

4-19. **Analyzing the Situation; Media Skills: Presentations [LO-2]** Visit the PepsiCo website at **www.pepsico.com** and locate the latest annual report. Read the CEO's letter to shareholders. (Typically, it's the first section of the annual report.) Who is the audience for this message? What is the general purpose of the message? What information do you think this audience wants from PepsiCo? Summarize your answers in a one-page report or a five-slide presentation, as your instructor directs.

4-20. Planning: Defining Your Purpose [LO-2] For each of the following communication tasks, state a specific purpose (if you have trouble, try beginning with "I want to…").

a. A report to your boss, the store manager, about the outdated items in the warehouse
b. A memo to clients about your booth at the upcoming trade show
c. A letter to a customer who hasn't made a payment for three months
d. A memo to employees about the department's high phone bills
e. A phone call to a supplier, checking on an overdue parts shipment
f. A report to future users of the computer program you have chosen to handle the company's mailing list

4-21. Planning: Developing an Audience Profile [LO-2] For each communication task that follows, write brief answers to three questions: Who is the audience? What is the audience's general attitude toward my subject? What does the audience need to know?

a. A final-notice collection letter from an appliance manufacturer to an appliance dealer that is 3 months behind on payments, sent 10 days before initiating legal collection procedures
b. An advertisement for smartphones
c. A proposal to top management, suggesting that the four sales regions in the United States be combined into just two regions
d. Fliers to be attached to doorknobs in the neighborhood, announcing reduced rates for chimney cleaning or repairs
e. A cover letter sent along with your résumé to a potential employer
f. A website that describes the services offered by a consulting firm that helps accounting managers comply with government regulations

4-22. Planning: Analyzing the Situation; Collaboration: Planning Meetings [LO-2], Chapter 2 How can the material discussed in this chapter also apply to meetings, as discussed in Chapter 2? Outline your ideas in a brief presentation or a post for your class blog.

4-23. Planning: Creating an Audience Profile; Collaboration: Team Projects [LO-2], [LO-3], Chapter 2 With a team assigned by your instructor, compare the Facebook pages of three companies in the same industry. Analyze the content in all the available sections. (You don't have to evaluate every post, but visit all the different sections.) What can you surmise about the intended audience for each company? Which of the three does the best job of presenting the information its target audience is likely to need? Prepare a brief presentation, including slides that show samples of the Facebook content from each company.

4-24. Planning: Analyzing the Situation, Selecting Media; Media Skills: Email [LO-2], [LO-4], Chapter 11 You are the head of public relations for a cruise line that operates out of Miami. You are shocked to read a letter in a local newspaper from a disgruntled passenger, complaining about the service and entertainment on a recent cruise. You need to respond to these publicized criticisms in some way. What audiences will you need to consider in your response? What medium or media should you choose? If the letter had been published in a travel publication widely read by travel agents and cruise travelers, how might your course of action have differed? In an email message to your instructor, explain how you will respond.

4-25. Planning: Assessing Audience Needs [LO-3] Choose a device that you know how to operate well. Write two sets of instructions for operating the device: one set for a reader who has never used that type of device and one set for someone who is generally familiar with that type of device but has never operated the specific model. Briefly explain how your two audiences affect your instructions.

4-26. Planning: Assessing Audience Needs; Media Skills: Blogging; Communication Ethics: Making Ethical Choices [LO-3], Chapter 1 Your supervisor has asked you to withhold important information that you think should be included in a report you are preparing. Disobeying him could be disastrous for your working relationship and your career. Obeying him could violate your personal code of ethics. What should you do? Based on the discussion in Chapter 1, would you consider this situation to be an ethical dilemma or an ethical lapse? Explain your analysis in a brief email message to your instructor.

4-27. Planning: Assessing Audience Needs; Media Skills: Mobile [LO-4] Using a computer or full-sized tablet, visit the website of any well-known company and review its About or About Us page. Identify three ways you would modify this page to meet the needs of readers accessing it with smartphones or phablets.

4-28. Planning: Limiting Your Scope [LO-5] Suppose you are preparing to recommend that top management install a new heating system that uses the cogeneration process. The following information is in your files. Eliminate topics that aren't essential, and then arrange the other topics so that your report will give top managers a clear understanding of the heating system and a balanced, concise justification for installing it.

- History of the development of the cogeneration heating process
- Scientific credentials of the developers of the process
- Risks assumed in using this process
- Your plan for installing the equipment in the headquarters building
- Stories about the successful use of cogeneration technology in comparable facilities
- Specifications of the equipment that would be installed
- Plans for disposing of the old heating equipment
- Costs of installing and running the new equipment
- Advantages and disadvantages of using the new process
- Detailed 10-year cost projections
- Estimates of the time needed to phase in the new system
- Alternative systems that management might want to consider

4-29. Planning: Using Storytelling Techniques; Communication Ethics: Providing Ethical Leadership; Media Skills: Podcasting [LO-5], Chapter 1, Chapter 7 Research recent incidents of ethical lapses by a business professional or

executive in any industry. Choose one example that has a clear story "arc" from beginning to end. Outline a cautionary tale that explains the context of the ethical lapse, the choice the person made, and the consequences of the ethical lapse. Script a podcast (aim for roughly three to five minutes) that tells the story. If your instructor directs, record your podcast and post to your class blog.

Expand Your Skills

Critique the Professionals

Locate an example of professional communication in any medium that you think would work equally well—or perhaps better—in another medium, such as a speech that would work as well or better as a blog post. Using the information in this chapter and your understanding of the communication process, write a brief analysis (no more than one page) of the company's media/channel choice and explain why your choice would be at least as effective. Use whatever medium your instructor requests for your report, and be sure to cite specific elements from the piece and support from the chapter.

Sharpening Your Career Skills Online

Find a website, video, article, podcast, or presentation that offers advice on planning a report, speech, or other business message. Write a brief email message to your instructor, describing the item you found and summarizing the career skills information you learned from it.

Build Your Career

Read "Writing the Story of You" on page 519, and study the example in Figure 18.1. Using the three sections in Figure 18.1 (Where I Have Been, Where I Am Now, and Where I Want to Be), outline the story arc of your career so far. Keep this document handy, and add to it whenever ideas come to you in the remaining weeks of the course. For example, as you continue to study business and discover different career facets that sound interesting, consider adding them to the Where I Want to Be section. Also, keep track of any questions or concerns you have about your future career options so that you can research them as your schedule allows. By the time you're ready to write your résumé and launch your job search, this document should give you some useful focus and direction.

Five-Minute Guide to Planning a Business Message or Document

Get every writing or presentation project off to a solid start with this five-minute organizer. Before you start, spend five minutes reviewing these steps to assess what you know and the information you have in hand, and then set aside additional time as needed to fill in the missing parts.

00:01

Assess the Situation

1. What is your **general purpose?** Do you intend to inform, persuade, or collaborate?
2. What is your **specific purpose**? What do you hope to accomplish with this message?

00:02

Identify the Information You Will Need

1. How many of these questions can you answer right now with no additional research?
   - Who is your **primary audience**? Are there any **secondary audiences** to consider?
   - How many people do you need to reach?
   - Where are they located and how can you reach them?
   - What is their level of understanding of the subject?
   - How are they likely to react to your message?
2. For the questions you can't answer, devise a plan to get the information you need.

00:03

Select the Best Media/Channel Combo

1. Given your purpose and audience, what is the best medium to use—oral, written, or visual?
2. What is the best channel to use—digital or nondigital (in person or print)?

	Digital channel	Nondigital channel
Oral	+ Create opportunities for immediate feedback; recordings (such as podcasts) allow time-shifted consumption. – Lack most nonverbal cues (unless video).	+ Ideal for immediate feedback and discussion; best for conveying emotion. – Restricted to those physically present; no written record unless transcribed; less control.
Written	+ Fast, easy way to reach wide audiences; link to additional information; social media invite interaction. – Security and privacy vulnerabilities; competition with other digital messages.	+ Give permanent, verifiable record that is difficult to modify; written medium lets you plan and control the message. – Present limited opportunity for timely feedback; lack nonverbal cues of oral medium.
Visual	+ Can convey complex ideas and relationships quickly; often less intimidating than blocks of text; multimedia options. – Usually require more time and skill.	+ Same as digital visuals. – Same as digital visuals, plus printing and distribution can add cost.

00:04

Define Your Main Idea

What is the single most important point you want to convey in this message? If you can't state it clearly and concisely, set aside some time to find your focus.

00:05

Decide Whether to Use the Direct or Indirect Approach

Direct Approach	Indirect Approach
General plan: Open with main idea, and then back it up with evidence and reasoning. **Strengths:** Gets to the point immediately if you need to get someone's attention right away. **Weaknesses:** Can come across as arrogant or blunt; readers or listeners can reject your main idea before considering your evidence and reasoning.	**General plan:** Open with buffer to establish common ground or get attention, lay out evidence to guide reader toward main idea, and then present it. **Strengths:** Helps soften an emotional blow or guide reader toward desired response. **Weaknesses:** Takes longer to reach main idea; buffers can be annoying or even unethical if done poorly.

Endnotes

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5 Writing Business Messages

LEARNING OBJECTIVES

After studying this chapter, you will be able to

1. Identify the four aspects of being sensitive to audience needs when writing business messages.
2. Identify seven characteristics that build and maintain a communicator's credibility.
3. Explain how to achieve a tone that is conversational but businesslike, explain the value of using plain language, and define *active voice* and *passive voice*.
4. Describe how to select words that are both correct and effective.
5. Define the four types of sentences, and explain how sentence style affects emphasis within a message.
6. Define the three key elements of a paragraph, and list five ways to develop unified, coherent paragraphs.
7. List five techniques for writing effective messages for mobile readers.



Courtesy of Kaleigh Moore

Business writer Kaleigh Moore combines business acumen with well-honed writing skills to develop effective social media content for a variety of e-commerce and software companies.

COMMUNICATION CLOSE-UP AT
Lumen/Kaleigh Moore

wearelumen.com/www.kaleighmoore.com

All business professionals are expected to do some writing on the job, but if you enjoy the creative fulfillment of writing, you might consider pursuing a career as a full-time business writer. Business writing jobs cover a wide range of subject matter, including technical and scientific writing, training materials, video scripts, position papers and backgrounders (often referred to as *white papers*), marketing materials, advertising, and social media content. Projects can range from tweets all the way up to full-length books, and writers can be employed in-house for corporations, can work for specialist communication agencies, or can operate as independent freelancers.

Kaleigh Moore is a great example of someone who has turned business acumen and a passion for writing into a thriving career as an independent writer. Her specialty is writing social media content and developing communication strategies for companies involved in e-commerce and software-as-a-service (a segment of the business software market in which customers essentially rent online computing capacity, rather than buying and installing software themselves). She also offers coaching to aspiring freelance writers to help them get started in the business and publishes a blog and a newsletter packed with writing advice. And as if all that didn't keep her busy enough, she also partners with her husband, a business consultant and designer, in a firm called Lumen to offer clients a full suite of marketing communication services.

As is the case with many independent business writers, Moore has a diverse professional background, having worked as a journalist and photographer, as a public relations manager, and as an entrepreneur. This path helped her develop her writing skills and business insights to the degree that she can offer her clients strategic advice in addition to communication services. Clients applaud her ability to grasp business challenges and craft engaging content that connects with target readers.

When she's not busy writing for her clients, she is a prolific contributor to leading business periodicals, including *Entrepreneur* and *Inc*. (To read her *Inc.* articles, which offer a wide range of practical tips on writing for e-commerce and other marketing areas, visit **www.inc.com/author/kaleigh-moore**.)

If writing full-time appeals to you, all the skills you are developing in this course and the insights you are gaining into communicating in a professional context will help. Combine this preparation with a few years of on-the-job experience, and you'll be ready to explore the possibility of striking out on your own.[1]

Adapting to Your Audience: Being Sensitive to Audience Needs

1 LEARNING OBJECTIVE
Identify the four aspects of being sensitive to audience needs when writing business messages.

Kaleigh Moore (profiled in the chapter-opening Communication Close-Up) knows it takes more than just a great idea to change the way people think. Whether consciously or not, audiences greet most incoming messages with a selfish question: "What's in this for me?" If your readers or listeners don't think you understand or care about their needs, they probably won't pay attention.

Readers and listeners are more likely to respond positively when they believe messages address their concerns.

USING THE "YOU" ATTITUDE

Adopting the "you" attitude means speaking and writing in terms of your audience's wishes, interests, hopes, and preferences.

Chapter 1 introduced the notion of audience-centered communication and the "you" attitude—speaking and writing in terms of your audience's wishes, interests, hopes, and preferences. On the simplest level, you can adopt the "you" attitude by replacing terms such as *I, me, mine, we, us*, and *ours* with *you* and *yours*:

Instead of This	Write This
Tuesday is the only day that we can promise quick response to purchase order requests. We are swamped the rest of the week.	If you need a quick response, please submit your purchase order requests on Tuesday.
At Construction Resources, we are proud to supply the highest-rated engineered wood in the entire Midwest.	Ensure the integrity of your building projects with the highest-rated engineered wood in the entire Midwest.

Of course, you will have occasions when it is appropriate to write or speak from your perspective, such as when you are offering your opinions or reporting on something you have seen. Even in those instances, though, make sure you focus on your readers' needs.

Check out the "Five-Minute Guide to Composing a Business Message or Document" at the end of the chapter.

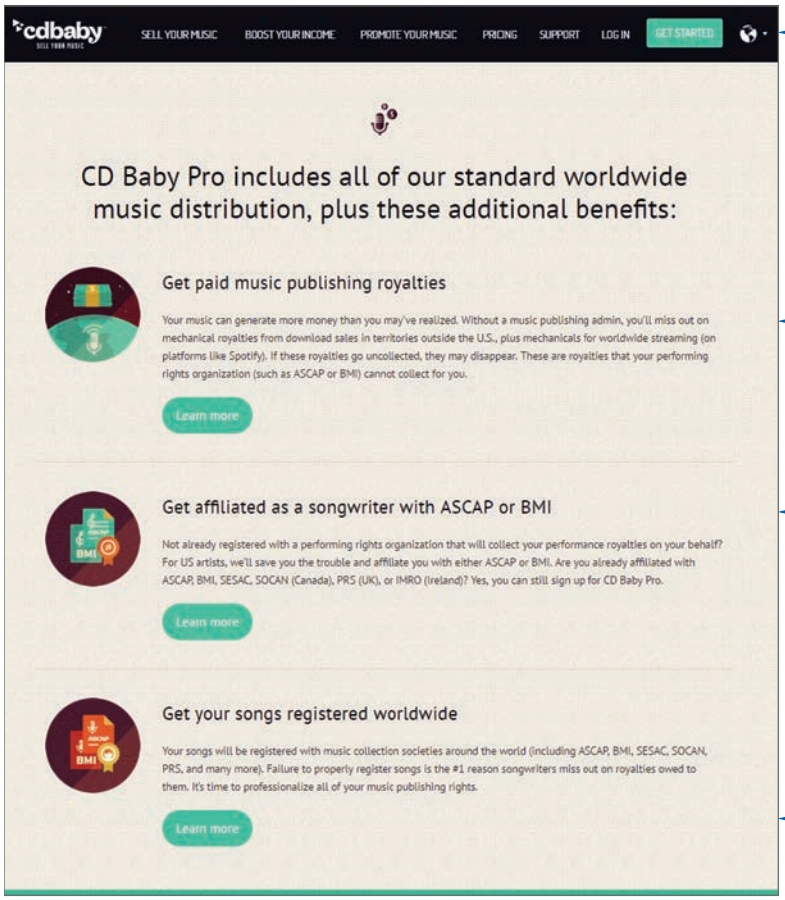
Also, be aware that the "you" attitude involves a lot more than just using particular pronouns. It's a matter of demonstrating genuine interest in your readers and concern for their needs (see Figure 5.1). You can use *you* 25 times in a single page and still offend your audience or ignore readers' true concerns. If you're writing to a retailer, try to think like a retailer; if you're dealing with a production supervisor, put yourself in that position; if you're writing to a dissatisfied customer, imagine how you would feel at the other end of the transaction.

Avoid using *you* and *your* when doing so
- Makes you sound dictatorial
- Makes someone else feel guilty
- Goes against your organization's style

Be aware that on some occasions, it's better to avoid using *you*, particularly if doing so will sound overly authoritative or accusing:

Instead of This	Write This
You failed to deliver the customer's order on time.	The customer didn't receive the order on time.
You must correct all five copies by noon.	All five copies must be corrected by noon.

As you practice using the "you" attitude, be sure to consider the attitudes of other cultures and the policies of your organization. In some cultures, for instance, it is improper to single out one person's achievements because the whole team is considered responsible for the outcome. In such cases, using the pronoun *we* or *our* (when you and your audience are part of the same team) would be more appropriate. Similarly, some companies have a tradition of avoiding references to *you* and *I* in formal documents.



The titles of the major sections of the website demonstrate a focus on the audience: Sell *Your* Music, Boost *Your* Income, and Promote *Your* Music.

Sentences such as "Your music can generate more money than you may've realized" speak directly to the concerns shared by all professional musicians.

Headings and subheadings are clear, concise, and focused on reader concerns.

Each of the important topics on this page is introduced with a brief overview that helps readers get oriented. Anyone who wants more information can easily find it via the Learn More links.

Figure 5.1 Fostering a Positive Relationship with an Audience
CD Baby, the world's largest retailer of independent music, uses clear, positive language to help musicians understand the process of selling their music through the company and its affiliates. By making the effort to communicate clearly and succinctly, the company encourages a positive response from its target readers.

MAINTAINING STANDARDS OF ETIQUETTE

Good etiquette shows respect for your audience and helps foster a more successful environment for communication by minimizing negative emotional reactions:

Instead of This	Write This
Once again, you've managed to bring down the website through your incompetent programming.	Let's review the last website update to explore ways to improve the process.
You've been sitting on our order for two weeks, and we need it now!	Our production schedules depend on timely delivery of parts and supplies, but we have not yet received the order scheduled for delivery two weeks ago. Please respond today with a firm delivery commitment.

Use extra tact when communicating with people higher up the organization chart or outside the company.

Naturally, some situations require more diplomacy than others. If you know your audience well, a less formal approach may be more appropriate. When you are communicating with people who outrank you or with people outside your organization, an added measure of courtesy is usually needed.

With written communication and most forms of digital communication, pay extra attention to tact. When you're speaking, your words can be softened by your tone of voice and facial expressions. Plus, you can adjust your approach according to the feedback you get. However, if you inadvertently offend someone in writing or in a podcast,

for example, you don't usually get the immediate feedback you would need to resolve the situation. In fact, you may never know that you offended your audience.

EMPHASIZING THE POSITIVE

You can communicate negative news without being negative.

During your career, you will have many occasions in which you need to communicate bad news. However, there is a big difference between *delivering* negative news and *being* negative. When the tone of your message is negative, you put unnecessary strain on business relationships. Never try to hide negative news, but always be on the lookout for positive points that will foster a good relationship with your audience:[2]

Instead of This	Write This
It is impossible to repair your laptop today.	Your computer can be ready by Tuesday. Would you like a loaner until then?
We wasted $300,000 advertising in that magazine.	Our $300,000 advertising investment did not pay off; let's analyze the experience and apply the insights to future campaigns.

If you find it necessary to criticize or correct, don't dwell on the other person's mistakes. Avoid referring to failures, problems, or shortcomings. Focus instead on what the audience members can do to improve the situation:

Instead of This	Write This
The problem with this department is a failure to control costs.	The performance of this department can be improved with tighter cost controls.
You failed to provide all the necessary information on the previous screen.	Please review the items marked in red so that we can process your order as quickly as possible.

Show readers how they will benefit by responding to your message.

If you're trying to persuade audience members to buy a product, pay a bill, or perform a service for you, emphasize what's in it for them. When people recognize the benefits of doing so, they are more likely to respond positively to your appeal:

Instead of This	Write This
We will notify all three credit reporting agencies if you do not pay your overdue bill within 10 days.	Paying your overdue bill within 10 days will prevent a negative entry on your credit record.
I am tired of seeing so many errors in the customer service blog.	Proofreading your blog posts will help avoid embarrassing mistakes that erode confidence in our ability to help customers.

Euphemisms are milder synonyms that can express an idea while triggering fewer negative connotations, but they should never be used to obscure the truth.

In general, try to state your message without using words that may hurt or offend your audience. Look for appropriate opportunities to use **euphemisms**—words or phrases that express a thought in milder terms—that convey your meaning without carrying negative or unpleasant connotations. For example, one common euphemism is referring to people beyond a certain age as "senior citizens" rather than "old people." *Senior* conveys respect in a way that *old* doesn't.

Euphemisms can bring a tone of civility to unpleasant communication, but they must be used with great care because they are easy to misuse. Euphemisms can be annoying if they force readers to "read between the lines" to get the message, and they can be unethical if they obscure the truth. For instance, one of the toughest messages a manager ever has to write is an internal memo or email announcing layoffs. This is a difficult situation for everyone involved, and managers can be tempted to resort to euphemisms such as *streamlining, restructuring, improving efficiency, reducing layers*, or *eliminating redundancies* to avoid using the word *layoff*.[3] Doing so might ease the emotional burden on the writer and promote the illusion that the message isn't as negative as it really is. However, these euphemisms can fail the "you" attitude test, as well as the standards of ethical information, by failing to answer the question every reader in these situations has, which is simply: *Am I going to lose my job?*

If you are considering using a euphemism, ask yourself this question: Are you trying to protect the reader's feelings or your own feelings? Even if it is unpleasant, people

generally respond better to an honest message delivered with integrity than they do to a sugar-coated message that obscures the truth.

USING BIAS-FREE LANGUAGE

Bias-free language avoids words and phrases that unfairly and even unethically categorize or stigmatize people.

Bias-free language avoids words and phrases that unfairly and even unethically categorize or stigmatize people in ways related to gender, race, ethnicity, age, disability, or other personal characteristics (see Table 5.1). Contrary to what some may think, biased language is not simply about "labels" or "political correctness." To a significant degree, language reflects the way we think and what we believe, and biased language may well perpetuate the underlying stereotypes and prejudices it represents.[4] Moreover, because communication is all about perception, simply *being* fair and objective isn't enough. To establish a good relationship with your audience, you must also *appear* to be fair.[5] Good communicators make every effort to avoid biased language. Bias can come in a variety of forms:

- **Gender bias.** Avoid sexist language by using the same labels for everyone, regardless of gender. Don't refer to a woman as *chairperson* and then to a man as *chairman*. Use *chair, chairperson*, or *chairman* consistently. Reword sentences to use *they* or

TABLE 5.1 Overcoming Bias in Language

Examples	Biased Wording	Preferable
Gender Bias		
Using words containing *man*	man-made	artificial, synthetic, manufactured, constructed, human-made
	mankind	humanity, human beings, human race, people
	manpower	workers, workforce
	businessman	executive, manager, businessperson, professional
	salesman	sales representative, salesperson
	foreman	supervisor
Using female-gender words	actress, stewardess	actor, flight attendant
Using special designations	woman doctor, male nurse	doctor, nurse
Using *he* to refer to "everyone"	The average worker . . . he	The average worker . . . he or she *OR* Average workers . . . they
Identifying roles with gender	The typical executive spends four hours of his day in meetings.	Most executives spend four hours a day in meetings.
	the consumer . . . she	consumers . . . they
	the nurse/teacher . . . she	nurses/teachers . . . they
Identifying women by marital status	Mrs. Norm Lindstrom	Maria Lindstrom *OR* Ms. Maria Lindstrom
	Norm Lindstrom and Ms. Drake	Norm Lindstrom and Maria Drake *OR* Mr. Lindstrom and Ms. Drake
Racial and Ethnic Bias		
Assigning stereotypes	Not surprisingly, Shing-Tung Yau excels in mathematics.	Shing-Tung Yau excels in mathematics.
Identifying people by race or ethnicity	Andrew Cuomo, Italian American politician and governor of New York	Andrew Cuomo, politician and governor of New York
Age Bias		
Including age when irrelevant	Mary Kirazy, 58, has just joined our trust department.	Mary Kirazy has just joined our trust department.
Disability Bias		
Putting the disability before the person	Disabled workers face many barriers on the job.	Workers with physical disabilities face many barriers on the job.
	An epileptic, Tracy has no trouble doing her job.	Tracy's epilepsy has no effect on her job performance.

to use no pronoun at all rather than refer to all individuals as *he*. Note that the preferred title for women in business is *Ms.* unless the individual asks to be addressed as *Miss* or *Mrs.* or has some other title, such as *Dr.*

- **Racial and ethnic bias.** Avoid identifying people by race or ethnic origin unless such a label is relevant to the matter at hand—and it rarely is.
- **Age bias.** Mention the age of a person only when it is relevant. Moreover, be careful of the context in which you use words that refer to age; such words carry a variety of positive and negative connotations. For example, *young* can imply energy, youthfulness, inexperience, or even immaturity, depending on how it's used.
- **Disability bias.** Physical, mental, sensory, or emotional impairments should never be mentioned in business messages unless those conditions are directly relevant to the subject. If you must refer to someone's disability, put the person first and the disability second.[6] For example, by saying "employees with physical handicaps," not "handicapped employees," you focus on the whole person, not the disability. Finally, never use outdated terminology such as *crippled* or *retarded*.

Adapting to Your Audience: Building Strong Relationships

2 LEARNING OBJECTIVE
Identify seven characteristics that build and maintain a communicator's credibility.

Successful communication relies on a positive relationship between sender and receiver. Establishing your credibility and projecting your company's image are two vital steps in building and fostering positive business relationships.

ESTABLISHING YOUR CREDIBILITY

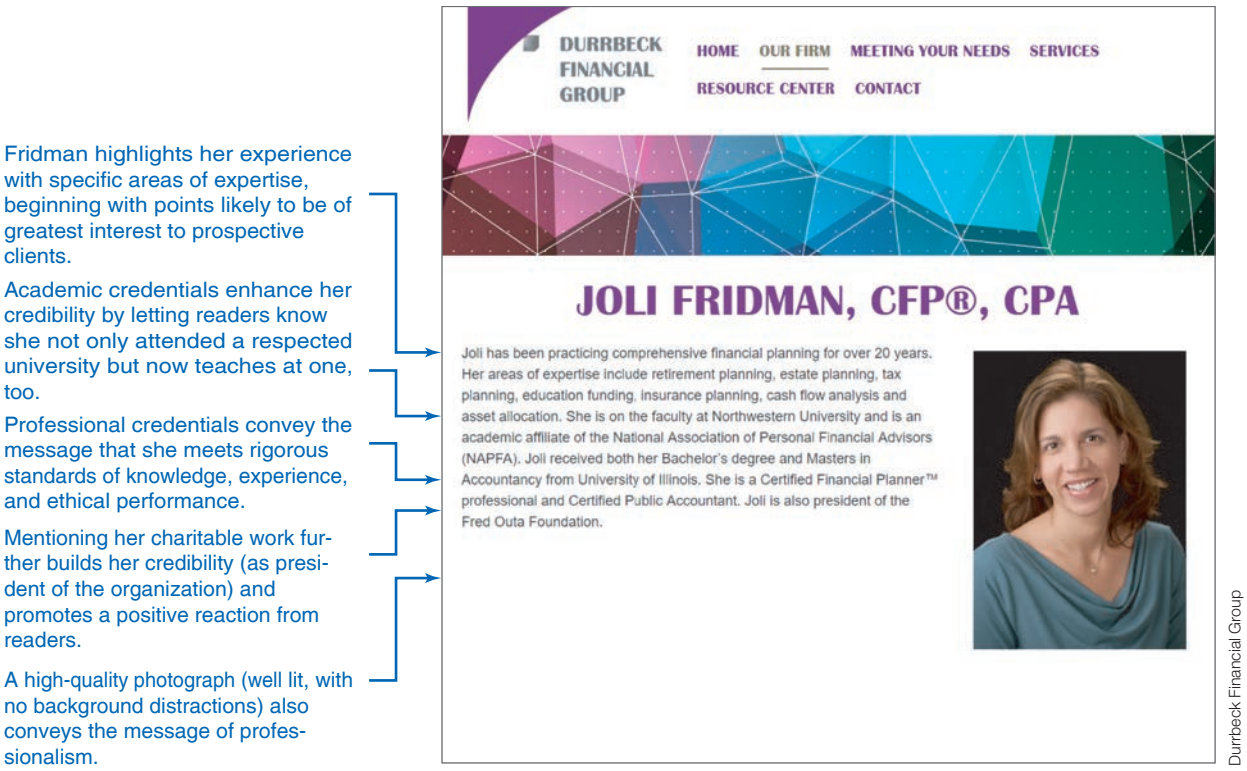
Credibility is a measure of your believability based on how reliable you are and how much trust you evoke in others.

Audience responses to your messages depend heavily on your **credibility**, a measure of your believability based on how reliable you are and how much trust you evoke in others. With audiences who don't know and trust you already, you need to establish credibility before they'll accept your messages (see Figure 5.2). When you do establish credibility, communication becomes much easier because you no longer have to spend time and energy convincing people that you are a trustworthy source of information and ideas. To build, maintain, or repair your credibility, emphasize the following characteristics:

To enhance your credibility, emphasize such factors as honesty, objectivity, and awareness of audience needs.

- **Honesty.** Demonstrating honesty and integrity will earn you the respect of your audiences, even if they don't always agree with or welcome your messages.
- **Objectivity.** Show that you can distance yourself from emotional situations and look at all sides of an issue.
- **Awareness of audience needs.** Directly or indirectly, let your audience members know that you understand what's important to them.
- **Credentials, knowledge, and expertise.** Audiences need to know that you have whatever it takes to back up your message, whether it's education, professional certification, special training, past successes, or simply the fact that you've done your research.
- **Endorsements.** An *endorsement* is a statement on your behalf by someone who is accepted by your audience as an expert.
- **Performance.** Demonstrating impressive communication skills is not enough; people need to know they can count on you to get the job done.
- **Sincerity.** When you offer praise, don't use *hyperbole*—over-the-top exaggeration, such as "you are the most fantastic employee I could ever imagine." Instead, point out specific qualities that warrant praise.

In addition, audiences need to know that you believe in yourself and your message. If you lack faith in yourself, you're likely to communicate an uncertain attitude that undermines your credibility. In contrast, if you are convinced that your message is sound, you



Durrbeck Financial Group

Figure 5.2 Building Credibility
In her profile page on her company's website, financial advisor Joli Fridman builds her credibility with a variety of specific, concrete statements. Notice how every statement packs a punch; there is no filler or "fluff."

can state your case with authority. Look out for phrases containing words such as *hope* and *trust*, which can drain the audience's confidence in your message:

Instead of This	Write This
We hope this recommendation will be helpful.	We're pleased to make this recommendation.
We trust that you'll want to extend your service contract.	By extending your service contract, you can continue to enjoy top-notch performance from your equipment.

Finally, keep in mind that credibility can take a long time to establish—and it can be wiped out in an instant. An occasional mistake or letdown is usually forgiven, but major lapses in honesty or integrity can destroy your reputation.

PROJECTING YOUR COMPANY'S IMAGE

When you communicate with anyone outside your organization, it is more than a conversation between two individuals. You represent your company and therefore play a vital role in helping the company build and maintain positive relationships with all its stakeholders. Most successful companies work hard to foster a specific public image, and your external communication efforts need to project that image. As part of this responsibility, the interests and preferred communication style of your company must take precedence over your own views and personal communication style.

Your company's interests and reputation take precedence over your personal views and communication style.

Many organizations have communication guidelines that outline everything from the correct use of the company name to preferred abbreviations and other grammatical details. Specifying a desired style of communication is more difficult, however. Observe more-experienced colleagues, and never hesitate to ask for editorial help to make sure you're conveying the appropriate tone. For instance, because clients entrust thousands or millions of dollars to an investment firm, it must communicate in a style quite different from that of a clothing retailer. And a clothing retailer specializing in high-quality business attire communicates in a different style than a store catering to the latest trends in casual wear.

Adapting to Your Audience: Controlling Your Style and Tone

3 LEARNING OBJECTIVE
Explain how to achieve a tone that is conversational but businesslike, explain the value of using plain language, and define *active voice* and *passive voice*.

Communication *style* involves the choices you make to express yourself; your style creates a certain *tone*, or overall impression.

Your communication **style** involves the choices you make to express yourself: the words you select, the manner in which you use those words in sentences, and the way you build paragraphs from individual sentences. Your style creates a certain **tone**, or overall impression, in your messages. The right tone depends on the nature of your message and your relationship with the reader.

CREATING A CONVERSATIONAL TONE

A conversational tone is warm but businesslike and emphasizes plain, clear language; it is not too formal and not too casual.

The tone of your business messages can range from informal to conversational to formal. When you're communicating with your superiors or with customers, your tone may tend to be more formal and respectful.[7] That formal tone, however, might sound distant and cold if used with close colleagues. Part of the challenge of communicating on the job is to read each situation and figure out the appropriate tone to create.

Compare the three versions of the message in Table 5.2. The first is too formal and stuffy for today's audiences, whereas the third is inappropriately casual for business. The second message demonstrates the **conversational tone** used in most business communication—plain language that sounds businesslike without being stuffy at one

TABLE 5.2 Finding the Right Tone

Tone	Example
Stuffy: too formal for today's audiences	Dear Ms. Navarro: Enclosed please find the information that was requested during our telephone communication of May 14. As was mentioned at that time, Midville Hospital has significantly more doctors of exceptional quality than any other health facility in the state. As you were also informed, our organization has quite an impressive network of doctors and other health-care professionals with offices located throughout the state. In the event that you should need a specialist, our professionals will be able to make an appropriate recommendation. In the event that you have questions or would like additional information, you may certainly contact me during regular business hours. Most sincerely yours, Samuel G. Berenz
Conversational: just right for most business communication	Dear Ms. Navarro: Here's the information you requested during our phone conversation on Friday. As I mentioned, Midville Hospital has the highest-rated doctors and more of them than any other hospital in the state. In addition, we have a vast network of doctors and other health professionals with offices throughout the state. If you need a specialist, they can refer you to the right one. If you would like more information, please call any time between 9:00 and 5:00, Monday through Friday. Sincerely, Samuel Berenz
Unprofessional: too casual for business communication	Here's the 411 you requested. IMHO, we have more and better doctors than any other hospital in the state. FYI, we also have a large group of doctors and other health professionals w/offices close to U at work/home. If U need a specialist, they'll refer U to the right one. Any? just ring or msg. L8R, S

TABLE 5.3 Weeding Out Obsolete Phrases

Obsolete Phrase	Up-to-Date Replacement
we are in receipt of	we received
kindly advise	please let me/us know
attached please find	enclosed is *OR* I/we have enclosed
it has come to my attention	I have just learned *OR* [someone] has just informed me
the undersigned	I/we
in due course	(specify a time or date)
permit me to say that	(omit; just say whatever you need to say)
pursuant to	(omit; just say whatever you need to say)
in closing, I'd like to say	(omit; just say whatever you need to say)
we wish to inform you that	(omit; just say whatever you need to say)
please be advised that	(omit; just say whatever you need to say)

extreme or too laid-back and informal at the other extreme. You can achieve a tone that is conversational but still businesslike by following these guidelines:

- **Avoid stale and pompous language.** Most companies now shy away from such phrases as "attached please find" and "please be advised that." Similarly, avoid using obscure words, stale or clichéd expressions, and overly complicated sentences designed only to impress others (see Table 5.3).
- **Avoid preaching and bragging.** Readers tend to get irritated by know-it-alls who like to preach or brag. If you need to remind your audience of something that should be obvious, try to work in the information casually, perhaps in the middle of a paragraph, where it will sound like a secondary comment rather than a major revelation.
- **Be careful with intimacy.** Business messages should generally avoid intimacy, such as sharing personal details or adopting a casual, unprofessional tone. However, when you have a close relationship with audience members, such as among the members of a close-knit team, a more intimate tone is sometimes appropriate and even expected.
- **Be careful with humor.** Humor can easily backfire and divert attention from your message. If you don't know your audience well or you're not skilled at using humor in a business setting, don't use it at all. Avoid humor in formal messages and when you're communicating across cultural boundaries.

USING PLAIN LANGUAGE

Audiences can understand and act on plain language without reading it over and over to get the meaning.

An important aspect of creating a conversational tone is using *plain language* (or *plain English* specifically when English is involved). Plain language presents information in a simple, unadorned style that lets audiences grasp your meaning quickly and easily. It is language that recipients "can read, understand and act upon the first time they read it."[8] You can see how this definition supports using the "you" attitude and shows respect for your audience. In addition, plain language can make companies more productive and more profitable because people spend less time trying to figure out messages that are confusing or aren't written to meet their needs.[9]

SELECTING THE ACTIVE OR PASSIVE VOICE

In *active voice*, the subject performs the action and the object receives the action; in *passive voice*, the subject receives the action.

The active voice helps make your writing more direct, livelier, and easier to read.

Your choice of the active or passive voice affects the tone of your message. In **active voice**, the subject performs the action and the object receives the action: "Jodi sent the email message." In **passive voice**, the subject receives the action: "The email message was sent by Jodi." As you can see, the passive voice combines the helping verb *to be* with a form of the verb that is usually similar to the past tense.

Using the active voice helps make your writing more direct, livelier, and easier to read (see Table 5.4). In contrast, the passive voice is often cumbersome, can be unnecessarily vague, and can make sentences overly long. In most cases, the active voice is the better

TABLE 5.4 Choosing Active or Passive Voice

In general, use active voice to make your writing lively and direct.	
Dull and Indirect in Passive Voice	**Lively and Direct in Active Voice**
The new procedure was developed by the operations team.	The operations team developed the new procedure.
Legal problems are created by this contract.	This contract creates legal problems.
Reception preparations have been undertaken by our PR people for the new CEO's arrival.	Our PR people have begun planning a reception for the new CEO.
Passive voice is helpful when you need to be diplomatic or want to focus attention on problems or solutions rather than on people.	
Accusatory or Self-Congratulatory in Active Voice	**More Diplomatic in Passive Voice**
You lost the shipment.	The shipment was lost.
I recruited seven engineers last month.	Seven engineers were recruited last month.
We are investigating the high rate of failures on the final assembly line.	The high rate of failures on the final assembly line is being investigated.

Use passive voice to soften bad news, to put yourself in the background, or to create an impersonal tone when needed.

choice.[10] Nevertheless, using the passive voice can help you demonstrate the "you" attitude in some situations:

- When you want to be diplomatic when pointing out a problem or an error of some kind (the passive version seems less like an accusation)
- When you want to point out what's being done without taking or attributing either the credit or the blame (the passive version shifts the spotlight away from the person or persons involved)
- When you want to avoid personal pronouns in order to create an objective tone (the passive version may be used in a formal report, for example)

The second half of Table 5.4 illustrates several of these situations in which the passive voice helps focus your message on your audience.

Composing Your Message: Choosing Powerful Words

4 LEARNING OBJECTIVE
Describe how to select words that are both correct and effective.

While writing your first draft, don't try to write and edit at the same time, and don't worry about getting everything perfect yet; let your creativity flow.

After you have decided how to adapt to your audience, you're ready to begin composing your message. As you write your first draft, let your creativity flow. Don't try to draft and edit at the same time, and don't worry about getting everything perfect. Make up words if you can't think of the right ones, draw pictures, or talk out loud—do whatever it takes to get the ideas out of your head and onto your computer screen or a piece of paper. If you've planned carefully, you'll have time to revise and refine the material later. In fact, many writers find it helpful to establish a personal rule of never showing a first draft to anyone. By working in this "safe zone," away from the critical eyes of others, your mind will stay free to think clearly and creatively.

If you get stuck and feel unable to write, try to overcome writer's block by jogging your brain in creative ways. The introduction is often the hardest part to write, so put it aside and work on whichever parts of the document you're most comfortable with at any given moment. Work on nontext elements such as graphics or your cover page. Revisit your purpose and confirm your intent in writing the message. Give yourself a mental break by switching to a different project. Sometimes all you need to do is start writing without worrying about the words you're using or how they will sound to the audience. Words will start flowing, your mind will engage, and the writing will come easier.

USING WORDS CORRECTLY

Careful writers look for the right words and take care to use them correctly.

Careful writers pay close attention to using the right words for every situation and using them correctly in context. Doing so is important on two levels. First, when you use words correctly, your writing becomes clearer, more efficient, and more enjoyable

to read. Second, using words correctly sends the signal that you care about the quality of your work, you understand the material you are writing about, and you are sensitive to your audience's information needs.

For the most part, English words have widely agreed-on meanings and well-established standards for how they should be used. However, the rules of grammar and usage can be a source of worry for writers because some rules are complex and others are in a state of flux that creates uncertainty. For example, most people were taught in school that it is incorrect to use *they* or *their* as a singular pronoun, to split infinitives, and to put a preposition at the end of a sentence. All three of these "rules" were introduced into English fairly late in its development in questionable attempts to make English grammar work more like Latin, and all three can create more problems than they solve:

Be alert to confusion and disagreement over several common usage rules.

- *They*/*their* have been used as singular pronouns by some of the greatest writers in the English language, and using them solves the problem of how to refer to one person when you don't know his or her gender or don't want to limit the reference to a particular individual.[11] Without them, you have to use *he or she* and *his or her*, which can get repetitive, or resort to *he*/*him*, which is sexist in many instances. Standards are changing about the singular *they*, with more and more language experts accepting it as a commonsense solution. In 2016, for example, the American Dialect Society voted the singular *they* as its word of the year.[12]
- The split infinitive rule (never putting an adverb between *to* and the verb) serves no logical purpose in terms of sentence structure or clarity, and following it can lead to phrasing that is clumsy or that distorts the writer's intended meaning.[13] For example, *Intelligent systems learn how to correctly spot suspicious interbank transactions* splits the infinitive *to spot* with the adverb *correctly*. Moving *correctly* before or after the infinitive would sound unnatural, and the third option of moving it to the end of the sentence moves the adverb away from the verb it modifies. The sentence is clear and effective as is.
- Similarly, avoiding prepositions at the end of sentences can create phrases that sound awkward or overly formal in today's usage.[14] For example, *After Jessica dropped out of the task force, I had no one left to collaborate with* violates the rule because the preposition *with* is at the end of the sentence. However, moving *with* away from the end sounds a bit too formal for most business usage: *After Jessica dropped out of the task force, I had no one left with whom I could collaborate.*

Unfortunately, the choices for today's business communicators aren't always easy because some people continue to insist that these rules must never be broken. (The irony here is that linguists and lexicographers, people who study language for a living, tend to be less strict about these rules than the self-appointed "grammar police.") To avoid controversy in these situations, you can usually find ways to rework sentences to avoid using disputed constructions.

These few examples aside, most questions of grammar and usage *are* settled and widely agreed upon, so you need to follow them to present yourself as an informed and quality-conscious professional. If you have doubts about what is correct, consult the Handbook of Grammar, Mechanics, and Usage at the end of this book, one of the many writing style guides now available, or leading online dictionaries such as Merriam-Webster (**www.merriam-webster.com**) and the Oxford Dictionaries (**en.oxforddictionaries.com**).

MOBILE APP

Dragon Dictation uses voice recognition to convert speech to text at a rate up to five times faster than typing.

USING WORDS EFFECTIVELY

In addition to using words correctly, successful writers also take care to find the most effective words and phrases.

In addition to using words correctly, successful writers and speakers take care to use the most effective words and phrases. Selecting and using words effectively is often more challenging than using words correctly because doing so is a matter of judgment and experience. Careful writers continue to work at their craft to find words that communicate with power (see Figure 5.3 on the next page).

By practicing your writing, learning from experienced writers and editors, and reading extensively, you'll find it easier to choose words that communicate exactly what you want to say. When you compose your business messages, think carefully to find the most



Figure 5.3 Choosing Powerful Words
The opening paragraphs of this blog post from Slack, the maker of a popular group messaging service, illustrate several effective word and phrase choices. Slack's usual communication tone is upbeat and casual, even a little bit playful, but data and network security is a critically important issue that had already affected the young company by this point in time, so this post strikes a balance between conversational and serious.

powerful words for each situation and to avoid obscure words, clichés, and buzzwords that are turning into clichés (see Table 5.5 on next page):

Find words that are powerful and familiar.

- **Choose strong, precise words.** Choose words that express your thoughts clearly and specifically. If you find yourself using a lot of adjectives and adverbs, you're probably trying to compensate for weak nouns and verbs. Saying that sales *plummeted* is stronger and more efficient than saying sales *dropped dramatically* or sales *experienced a dramatic drop*.
- **Choose familiar words.** You'll communicate best with words that are familiar to both you and your readers. Efforts to improve a situation certainly can be *ameliorative*, but saying they are *helpful* is more effective.

Avoid clichés, be extremely careful with trendy buzzwords, and use jargon only when your audience is completely familiar with it.

- **Avoid clichés, and use buzzwords carefully.** Although familiar words are generally the best choice, avoid *clichés*—once-colorful terms and phrases so common that they have lost some of their power to communicate. *Buzzwords*, newly coined terms often associated with technology, business, or cultural changes, are more difficult to handle than clichés because in small doses and in the right situations, buzzwords can be useful. The careful use of a buzzword can signal that you're an insider, someone in the know.[15] Be aware that buzzwords quickly become clichés, and using them too late in their "life cycle" can mark you as an outsider desperately trying to look like an insider.
- **Use jargon carefully.** *Jargon*, the specialized language of a particular profession or industry, has a bad reputation, but it's not always bad. Using jargon is often an efficient way to communicate within the specific groups that understand these terms. After all, that's how jargon develops in the first place, as people with similar interests devise ways to communicate complex ideas quickly. For instance, when a recording engineer wants to communicate that a piece of recorded music is devoid of reverberation and other processing effects, it's a lot easier to simply describe the track as "dry." Of course, to people who aren't familiar with such insider terms, jargon is meaningless and intimidating—one more reason it's important to understand your audience before you start writing.

MOBILE APP
The **Merriam-Webster** dictionary app offers the full Collegiate Dictionary and fun vocabulary games.

TABLE 5.5 Selected Examples of Finding Powerful Words

Potentially Weak Words and Phrases	Stronger Alternatives (Effective Usage Depends on the Situation)
increase (as a verb)	Accelerate, amplify, augment, enlarge, escalate, expand, extend, magnify, multiply, soar, swell
decrease (as a verb)	curb, cut back, depreciate, dwindle, shrink, slacken
large, small	Use a specific number, such as $100 million
good	admirable, beneficial, desirable, flawless, pleasant, sound, superior, worthy
bad	abysmal, corrupt, deficient, flawed, inadequate, inferior, poor, substandard, worthless
We are committed to providing . . .	We provide . . .
It is in our best interest to . . .	We should . . .
Unfamiliar Words	**Familiar Words**
ascertain	find out, learn
consummate	close, bring about
peruse	read, study
circumvent	avoid
unequivocal	certain
Clichés and Buzzwords	**Plain Language**
an uphill battle	a challenge
writing on the wall	prediction
call the shots	lead
take by storm	attack
costs an arm and a leg	expensive
a new ball game	fresh start
fall through the cracks	be overlooked
think outside the box	be creative
run it up the flagpole	find out what people think about it
eat our own dog food	use our own products
mission-critical	vital
disintermediate	simplify the supply chain
green light (as a verb)	approve
architect (as a verb)	design
space (as in, "we compete in the XYZ space")	market or industry
blocking and tackling	basic skills
trying to boil the ocean	working frantically but without focus
human capital	people, employees, workforce
low-hanging fruit	tasks that are easy to complete or sales that are easy to close
pushback	resistance

UNDERSTANDING DENOTATION AND CONNOTATION

A word may have both a denotative and a connotative meaning. The **denotative meaning** is the literal, or dictionary, meaning. The **connotative meaning** includes all the associations and feelings evoked by the word.

The denotative meaning of *desk* is "a piece of furniture with a flat work surface and various drawers for storage." The connotative meaning of *desk* may include thoughts associated with work or study, which are neutral—neither strong nor emotional. However, some words have much stronger connotations than others and should be used with care.

A word's *denotative meaning* is its literal, or dictionary, meaning; its *connotative meaning* includes all the associations and feelings it evokes.

For example, the connotations of the word *fail* are negative and can have a dramatic emotional impact. If you say the sales department *failed* to meet its annual quota, the connotative meaning suggests that the group is inferior, incompetent, or below some standard of performance. However, the reason for not achieving 100 percent might be an inferior product, incorrect pricing, a falling economy, or some other factor outside the control of the sales department. In contrast, by saying the sales department achieved 85 percent of its quota, you clearly communicate that the results were less than expected without triggering all the negative emotions associated with *failure*.

BALANCING ABSTRACT AND CONCRETE WORDS

An *abstract word* expresses a concept, quality, or characteristic; a *concrete word* stands for something you can touch, see, or visualize.

An **abstract word** expresses a concept, quality, or characteristic. Abstractions are usually broad, encompassing a category of ideas, and are often intellectual, academic, or philosophical. *Love, honor, progress, tradition*, and *beauty* are abstractions, as are such important business concepts as *efficiency, quality*, and *motivation*. In contrast, a **concrete word** stands for something you can touch, see, or visualize. Most concrete terms are anchored in the tangible, material world. *Chair, green, two*, and *horse* are concrete words; they are direct, clear, and exact. Things don't need to have a physical presence to be considered concrete, by the way; *app, database*, and *website* are all concrete terms as well.

Abstract words tend to cause more trouble than concrete words because they are sometimes fuzzy and can be interpreted differently, depending on the audience and the circumstances. The best way to minimize such problems is to balance abstract terms with concrete ones. State the concept, and then pin it down with details expressed in more concrete terms. Save the abstractions for ideas that cannot be expressed any other way.

Composing Your Message: Creating Effective Sentences

5 LEARNING OBJECTIVE
Define the four types of sentences, and explain how sentence style affects emphasis within a message.

Arranging your carefully chosen words in effective sentences is the next step in creating powerful messages. Start by selecting the best type of sentence to communicate each point you want to make.

CHOOSING FROM THE FOUR TYPES OF SENTENCES

A *simple sentence* has one main clause.

Sentences come in four basic varieties: simple, compound, complex, and compound-complex. A **simple sentence** has one main *clause* (a single subject and a single predicate), although it may be expanded by nouns and pronouns that serve as objects of the action and by modifying phrases. Here's an example with the subject noun underlined once and the predicate verb underlined twice:

> Profits increased 35 percent in the past year.

A *compound sentence* has two main clauses.

A **compound sentence** has two main clauses that express two or more independent but related thoughts of equal importance, usually joined by *and, but*, or *or*. In effect, a compound sentence is a merger of two or more simple sentences (independent clauses) that are related. For example:

> Wages declined by 5 percent, and employee turnover has been high.

The independent clauses in a compound sentence are always separated by a comma or by a semicolon (in which case the conjunction is dropped).

A *complex sentence* has one main clause and one subordinate clause.

A **complex sentence** expresses one main thought (the independent clause) and one or more subordinate, related thoughts (dependent clauses that cannot stand alone as valid sentences). Independent and dependent clauses are usually separated by a comma. In this

example, "Although you may question Gerald's conclusions" is a subordinate thought expressed in a dependent clause:

> Although you may question Gerald's conclusions, you must admit that his research is thorough.

A **compound-complex sentence** has two main clauses, at least one of which contains a subordinate clause:

A compound-complex sentence has two main clauses and at least one dependent clause.

> Profits increased 35 percent in the past year, so although the company faces long-term challenges, I agree that its short-term prospects look quite positive.

When constructing sentences, choose the form that matches the relationship of the ideas you want to express. If you have two ideas of equal importance, express them as two simple sentences or as one compound sentence. However, if one of the ideas is less important than the other, place it in a dependent clause to form a complex sentence. For example, although the following compound sentence uses a conjunction to join two ideas, they aren't truly equal:

> The chemical products division is the strongest in the company, and its management techniques should be adopted by the other divisions.

INTELLIGENT COMMUNICATION TECHNOLOGY

Amplifying Your Writing with Augmented Writing Software

What's the best way to say this?

That's a never-ending question for every business communicator. For just about anything beyond the simplest messages, we can never be entirely sure that we've found the most powerful words or crafted the most effective phrases. We must send our missives out into the world and hope we've done our best.

Moreover, in many cases we get only one chance to hit the mark. In contrast to interactive conversations (in person or online), where we get feedback quickly and can adjust the message if needed, a lot of business writing is a one-shot affair, and we'll never know if we've been as effective as we could be.

Digital tools have been assisting writers for decades, as far back as spell checkers that predate the PC era, but most haven't done much beyond applying simple rules. However, recent advances in natural language processing show some potential to fill this feedback void by providing real-time advice about the effectiveness of our language.

For example, Textio's *augmented writing* platform suggests words and phrases that it has determined to be more effective in a particular context. It does so by measuring the success of similar writing efforts and analyzing language choices that proved to be more effective or less effective.

Textio's initial focus has been on helping companies write job postings that can attract more of the most desirable candidates. By analyzing hundreds of millions of postings and comparing the candidate pools that they attracted, the system can figure out the most compelling way to describe a variety of job opportunities.

Organizations ranging from Twitter to Apple to the National Basketball Association are now using the system to improve their job postings. HR departments enter their job descriptions into Textio's *predictive engine*, which analyzes the text and suggests specific wording changes to attract target candidates. It also provides overall assessment points when it analyzes a posting, such as "Uses corporate clichés," "Sentences are too short," and "Contains too many questions," all based on how other job descriptions have performed.

Textio's clients are reporting success in terms of the number and quality of candidates they attract and how much faster they can fill job openings as a result. Plus, the system can help writers avoid biased or exclusionary language by showing how various demographic groups respond to different word choices.

Of course, a system like this relies on a large set of similar messages and the ability to measure the success of those messages, so it's not yet a general-purpose solution that one can apply to every kind of business writing. But Textio and its clients are already trying the tool on sales emails and other types of recurring messages, so its use could expand.

WHAT'S YOUR TAKE?

1. Will tools such as augmented writing reduce the need for professionals to develop their own communication skills? Why or why not?
2. Will augmented writing tools give some business communicators an unfair advantage? Why or why not?

Sources: Benjamin Romano, "With $20M from Scale, Textio Envisions 'Augmented Writing' Everywhere," *Xconomy*, 21 June 2017, www.xconomy.com; Textio website, accessed 23 March 2019, textio.com; "How Textio Is Changing Writing as We Know It," Scale Venture Partners, www.scalevp.com; Rachel Lerman, "Investors Pump $20M into Seattle Startup Textio, Which Helps Job Recruiters Find the Right Words," *Seattle Times*, 25 June 2017.

By making the first thought subordinate to the second, you can establish a cause-and-effect relationship and emphasize the more important idea (that the other divisions should adopt the chemical division's management techniques):

> Because the chemical products division is the strongest in the company, its management techniques should be adopted by the other divisions.

Maintain some variety among the four sentence types to keep your writing from getting choppy (from too many short, simple sentences) or exhausting (from too many long sentences).

In addition to selecting the best type for each thought you want to express, using a variety of sentence types throughout a document can make your writing more interesting and effective. For example, if you use too many simple sentences in a row, you may struggle to properly express the relationships among your ideas, and your writing will sound choppy and abrupt. At the other extreme, a long series of compound, complex, or compound-complex sentences can be tiring to read.

USING SENTENCE STYLE TO EMPHASIZE KEY THOUGHTS

Emphasize specific parts of sentences by
- Devoting more words to them
- Putting them at the beginning or at the end of the sentence
- Making them the subject of the sentence

In every message of any length, some ideas are more important than others. You can emphasize these key ideas through your sentence style. One obvious technique is to give important points the most space. When you want to call attention to a thought, give it additional support. Consider this sentence:

> The chairperson called for a vote of the shareholders.

To emphasize the importance of the chairperson, you might describe her more fully:

> Having considerable experience in corporate takeover battles, the chairperson called for a vote of the shareholders.

You can increase the emphasis even more by adding a separate, short sentence to augment the first:

> The chairperson called for a vote of the shareholders. She has considerable experience in corporate takeover battles.

You can also call attention to a thought by making it the subject of the sentence. In the following example, the emphasis is on the person:

> I can write letters much more quickly by using voice dictation.

However, by changing the subject, the voice dictation capability takes center stage:

> Using voice dictation enables me to write letters much more quickly.

Another way to emphasize an idea (in this instance, the idea of stimulating demand) is to place it either at the beginning or at the end of a sentence:

> **Less emphatic:** We are cutting the price to stimulate demand.
>
> **More emphatic:** To stimulate demand, we are cutting the price.

The best placement of the dependent clause depends on the relationship between the ideas in the sentence.

In complex sentences, the placement of the dependent clause hinges on the relationship between the ideas expressed. If you want to emphasize the subordinate idea, put the dependent clause at the end of the sentence (the most emphatic position) or at the beginning (the second most emphatic position). If you want to downplay the idea, put the dependent clause within the sentence:

Most emphatic: The electronic parts are manufactured in Mexico, which has lower wage rates than the United States.

Emphatic: Because wage rates are lower in Mexico than in the United States, the electronic parts are manufactured there.

Least emphatic: Mexico, which has lower wage rates than the United States, was selected as the production site for the electronic parts.

Techniques such as these give you a great deal of control over the way your audience interprets what you have to say. These techniques can also help you communicate with the "you" attitude. By helping your readers quickly grasp the most important points in each sentence, you can save them time and frustration.

Composing Your Message: Crafting Unified, Coherent Paragraphs

6 LEARNING OBJECTIVE
Define the three key elements of a paragraph, and list five ways to develop unified, coherent paragraphs.

Paragraphs organize sentences related to the same general topic. Readers expect every paragraph to be *unified*—focusing on a single topic—and *coherent*—presenting ideas in a logically connected way. By carefully arranging the elements of each paragraph, you help your readers grasp the main idea of your document and understand how the specific pieces of support material back up that idea.

CREATING THE ELEMENTS OF A PARAGRAPH

An effective paragraph is *unified* (it focuses on a single topic) and *coherent* (it presents ideas in a logically connected way).

Paragraphs vary widely in length and form, but a typical paragraph contains three basic elements: a topic sentence, support sentences that develop the topic, and transitional words and phrases.

Most paragraphs consist of
- A topic sentence that reveals the subject of the paragraph
- Related sentences that support and expand the topic
- Transitions that help readers move between sentences and paragraphs

Topic Sentence

An effective paragraph deals with a single topic, and the sentence that introduces it is called the **topic sentence** (see Figure 5.4 on the next page). In informal and creative writing, the topic sentence may be implied rather than stated. In business writing, the topic sentence is generally explicit and is often the first sentence in the paragraph. The topic sentence gives readers a summary of the general idea that will be covered in the rest of the paragraph. The following examples show how a topic sentence can introduce the subject and suggest the way the subject will be developed:

The *topic sentence* introduces the topic of a paragraph.

The medical products division has been troubled for many years by public relations problems. [In the rest of the paragraph, readers will learn the details of the problems.]

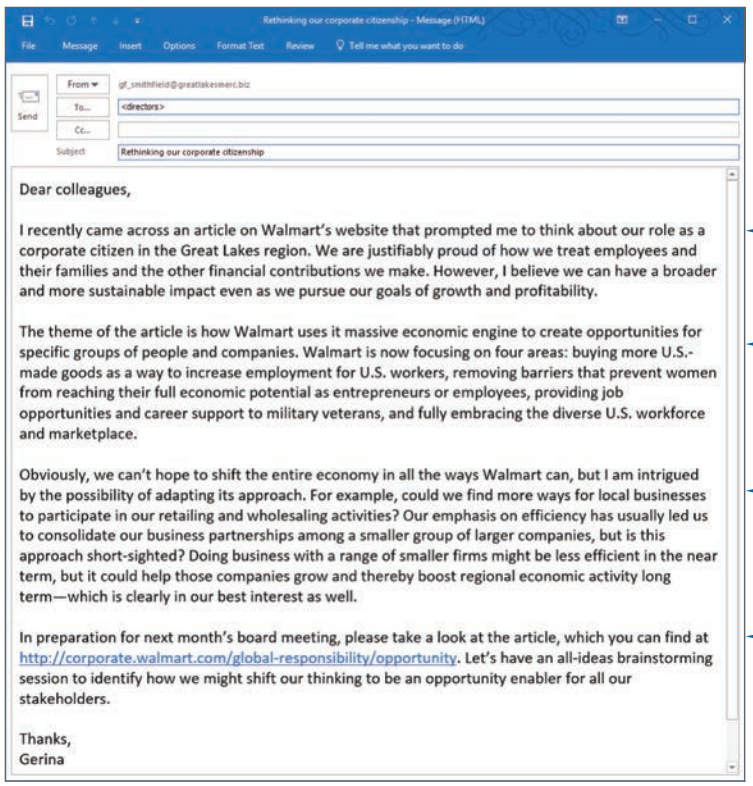
To get a refund, please supply us with the following information. [The details of the necessary information will be described in the rest of the paragraph.]

In addition to helping your readers, topic sentences help you as a writer because they remind you of the purpose of each paragraph and thereby encourage you to stay focused. In fact, a good way to test the effectiveness of your writing is to prepare a summary version that consists of only the first sentences of all your paragraphs. If this summary communicates the essence of your message in a sensible, compelling way, you've probably done a good job of presenting your information.[16]

Support Sentences

Support sentences explain, justify, or extend the idea presented in the topic sentence.

In most paragraphs, the topic sentence needs to be explained, justified, or extended with one or more support sentences. These related sentences must all have a bearing on the general subject and must provide enough specific details to make the topic clear:



Screenshot of Microsoft Outlook 2018. ©Microsoft Corporation

Figure 5.4 Topic Sentences
This email message establishes the scope of each paragraph with a clear topic sentence.

> The medical products division has been troubled for many years by public relations problems. The media and bloggers have published 15 articles in the past year that portray the division in a negative light. We have been accused of everything from mistreating laboratory animals to polluting the local groundwater. Our facility has been described as a health hazard. Our scientists are referred to as "Frankensteins," and our profits are considered "obscene."

Notice how these support sentences are all more specific than the topic sentence. Each one provides another piece of evidence to demonstrate the general truth of the main thought. Also, each sentence is clearly related to the general idea being developed, which gives the paragraph its unity. A paragraph is well developed when it contains enough information to make the topic sentence convincing and interesting and doesn't contain any unnecessary or unrelated sentences.

Transitions

Transitions connect ideas by showing how one thought is related to another.

Transitions connect ideas by showing how one thought is related to another. They also help alert the reader to what lies ahead so that shifts and changes don't cause confusion. In addition to helping readers understand the connections you're trying to make, transitions give your writing a smooth, even flow.

Transitional elements include
- Connecting words (conjunctions)
- Repeated words or phrases
- Pronouns
- Words that are frequently paired

Depending on the specific need within a document, transitional elements can range in length from a single word to an entire paragraph or more. You can establish transitions in a variety of ways:

- **Use connecting words.** Use conjunctions such as *and, but, or, nevertheless, however, in addition*, and so on.
- **Echo a word or phrase from a previous paragraph or sentence.** "A system should be established for monitoring inventory levels. *This system* will provide . . ."

- **Use a pronoun that refers to a noun used previously.** "Ms. Arthur is the leading candidate for the president's position. *She* has excellent qualifications."
- **Use words that are frequently paired.** "The machine has a *minimum* output of . . . Its *maximum* output is . . ."

MOBILE APP
Pages is a full-featured word-processing app for iOS devices.

Some transitions serve as mood changers, alerting the reader to a change in mood from the previous material. Some announce a total contrast with what's gone on before, some announce a cause-effect relationship, and some signal a change in time. Here is a list of transitions frequently used to move readers smoothly between clauses, sentences, and paragraphs:

Additional detail: moreover, furthermore, in addition, besides, first, second, third, finally

Cause-and-effect relationship: therefore, because, accordingly, thus, consequently, hence, as a result, so

Comparison: similarly, here again, likewise, in comparison, still

Condition: although, if

Contrast: yet, conversely, whereas, nevertheless, on the other hand, however, but, nonetheless

Illustration: for example, in particular, in this case, for instance

Intensification: indeed, in fact, in any event

Repetition: that is, in other words, as I mentioned earlier

Summary: in brief, in short, to sum up

Time sequence: formerly, after, when, meanwhile, sometimes

APPLY YOUR SKILLS NOW

Think Now, Write Later

When you get a new assignment, it's tempting to either dive in immediately so you don't get into a schedule crunch later or put it off until the last minute—when you will definitely be in a schedule crunch.

Not surprisingly, the do-it-later approach isn't always a successful way to work. Writing under a tight deadline can sometimes be invigorating, and time limits can help you stay focused, but mostly it's just stressful and exhausting. Plus, there's the potential problem of getting bogged down in complex issues at the last minute and not having enough time left to think through them or do additional research.

Somewhat more surprisingly, the do-it-right-now approach isn't always the most productive way to write, either. When you sit down and command yourself to write something *now*, the mind has a funny way of rebelling and giving you nothing but a blank stare. Instead of figuring out *what* you need to say, you'll start worrying about *how* to say it, and your inner editor will get in the way with criticism and self-doubt.

Try this modified approach instead. As soon as you get an assignment, dig into it but tell yourself you don't need to do any writing right now. Just explore the topic, do some research, and start to fill your mind with nuggets of information—without worrying about how you're going to say anything yet. Let these thoughts rumble around while you go off and do other things. Your mind will keep busy in the background, searching for connections between the bits of information you have collected, trying out ideas for organizing the piece, and generating useful phrases and other bits of text. The piece will gradually take shape somewhere between your conscious and subconscious mind before you begin to write, and when you do sit down to write, the words should flow faster and easier than trying to force them on command.

COACH YOURSELF

1. Do you ever find yourself in a panic when you get a writing assignment? If so, don't get down on yourself; this can happen to everybody, including professional writers who have been honing their craft for decades. Try this trick: Tell yourself you need to write just one sentence. As you fine-tune that sentence, you'll probably feel yourself settling into a groove, and the rest of the work will go more easily from there.
2. If you're in the habit of putting writing projects off to the last minute, what are some changes you could make to get yourself into a more-controlled and less-stressful mode of work?

Consider using a transition whenever it could help the reader understand your ideas and follow you from point to point. You can use transitions inside paragraphs to tie related points together and between paragraphs to ease the shift from one distinct thought to another. In longer reports, a transition that links major sections or chapters may be a complete paragraph that serves as a mini-introduction to the next section or as a summary of the ideas presented in the section just ending. Here's an example:

> Given the nature of this product, our alternatives are limited. As the previous section indicates, we can stop making it altogether, improve it, or continue with the current model. Each of these alternatives has advantages and disadvantages, which are discussed in the following section.

This paragraph makes it clear to the reader that the analysis of the problem (offered in the previous section) is now over and that the document is making a transition to an analysis of the possible solutions (to be offered in the next section).

CHOOSING THE BEST WAY TO DEVELOP EACH PARAGRAPH

Five ways to develop paragraphs:
- Illustration
- Comparison or contrast
- Cause and effect
- Classification
- Problem and solution

You have a variety of options for developing paragraphs, each of which can convey a specific type of idea. Five of the most common approaches are illustration, comparison or contrast, cause and effect, classification, and problem and solution (see Table 5.6).

In some instances, combining approaches in a single paragraph is an effective strategy. Notice how the example provided for "Problem and solution" in Table 5.6 also includes an element of illustration by listing some of the changes that could be part of the proposed solution. When combining approaches, do so carefully so that you don't lose readers partway through the paragraph.

In addition, before settling for the first approach that comes to mind, consider the alternatives. Think through various methods before committing yourself, or even write several test paragraphs to see which method works best. By avoiding the easy habit of repeating the same old paragraph pattern time after time, you can keep your writing fresh and interesting.

TABLE 5.6 Five Techniques for Developing Paragraphs

Technique	Description	Example
Illustration	Giving examples that demonstrate the general idea	Some of our most popular products are available through local distributors. For example, Everett & Lemmings carries our frozen soups and entrees. The J. B. Green Company carries our complete line of seasonings, as well as the frozen soups. Wilmont Foods, also a major distributor, now carries our new line of frozen desserts.
Comparison or contrast	Using similarities or differences to develop the topic	When the company was small, the recruiting function could be handled informally. The need for new employees was limited, and each manager could comfortably screen and hire her or his own staff. However, our successful bid on the Owens contract means that we will be doubling our labor force over the next six months. To hire that many people without disrupting our ongoing activities, we will create a separate recruiting group within the human resources department.
Cause and effect	Focusing on the reasons for something	The heavy-duty fabric of your Wanderer tent probably broke down for one of two reasons: (1) a sharp object punctured the fabric, and without reinforcement, the hole was enlarged by the stress of pitching the tent daily for a week, or (2) the fibers gradually rotted because the tent was folded and stored while still wet.
Classification	Showing how a general idea is broken into specific categories	Successful candidates for our supervisor trainee program generally come from one of several groups. The largest group by far consists of recent graduates of accredited business management programs. The next largest group comes from within our own company, as we try to promote promising staff workers to positions of greater responsibility. Finally, we occasionally accept candidates with outstanding supervisory experience in related industries.
Problem and solution	Presenting a problem and then discussing the solution	Shoppers are clearly not happy with our in-store shopping app—it currently has an average rating of under two stars in both the Apple and Android app stores. After studying dozens of reviews, I've identified three improvements that should make the app much friendlier. First, the user interface is too cluttered. We need to simplify it by presenting only the information the user needs at any given point in time. Second, the app is too slow at guiding shoppers to products of interest. We need to speed up the GPS and near-field algorithms. Third, we need to add a shopping list tracking feature so that customers don't need to type in their desired products every time they go shopping.

Writing Messages for Mobile Devices

7 LEARNING OBJECTIVE
List five techniques for writing effective messages for mobile readers.

To write effectively for mobile devices
- Use a linear organization
- Prioritize information
- Write short, focused messages
- Use short subject lines and headings
- Use short paragraphs

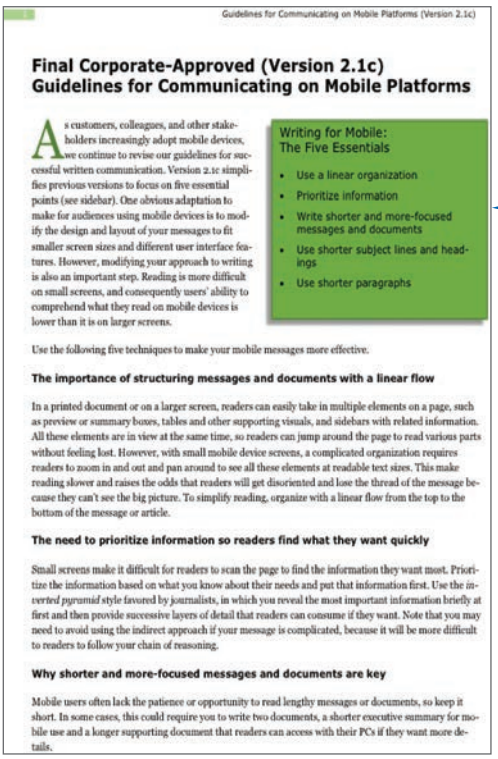
One obvious adaptation to make for audiences using mobile devices is to modify the design and layout of your messages to fit smaller screen sizes and different user interface features. However, modifying your approach to writing is also an important step. Reading is more difficult on small screens, and consequently users' ability to comprehend what they read on mobile devices is lower than it is on larger screens.[17] In fact, research shows that comprehension can drop by 50 percent when users move from reading on a full-size screen to reading on a smartphone, and they can scroll right past vital information without noticing it.[18] Use these five techniques to make your mobile messages more effective:

- **Use a linear organization.** In a printed document or on a larger screen, readers can easily take in multiple elements on a page, such as preview or summary boxes, tables and other supporting visuals, and sidebars with related information. All these elements are in view at the same time, so readers can jump around the page to read various parts without feeling lost. However, with small mobile device screens, a complicated organization requires readers to zoom in and out and pan around to see all these elements at readable text sizes. This situation makes reading slower and raises the odds that readers will get disoriented and lose the thread of the message because they can't see the big picture. In addition, using a touch screen momentarily obscures some of the information, so the more users must hunt and scroll, the more likely they will miss something.[19] To simplify reading, organize with a linear flow from the top to the bottom of the message or article.
- **Prioritize information.** Small screens make it difficult for readers to scan the page to find the information they want most. Prioritize the information based on what you know about their needs and put that information first.[20] Use the *inverted pyramid* style favored by journalists, in which you reveal the most important information briefly at first and then provide successive layers of detail that readers can consume if they want. Note that you may need to avoid using the indirect approach (see page 116) if your message is complicated because readers will find it harder to follow your chain of reasoning.
- **Write shorter and more-focused messages and documents.** Mobile users often lack the patience or opportunity to read lengthy messages or documents, so keep them short.[21] In some cases, doing so could require you to write two documents, such as a shorter *executive summary* (see page 433) for mobile use and a longer supporting document that readers can access with their PCs if they want more details.
- **Use shorter subject lines and headings.** Mobile devices, particularly phones, can't display as many characters in a single line of text as the typical computer screen can. Depending on the app or website, email subject lines and page headings will be truncated or will wrap around to take up multiple lines. Both formats make reading more

CHECKLIST ✓ Writing Business Messages

A. Adapt to your audience.
- Use the "you" attitude.
- Maintain good etiquette through polite communication.
- Emphasize the positive whenever possible.
- Use bias-free language.
- Establish credibility in the eyes of your audience.
- Project your company's preferred image.
- Use a conversational but still professional and respectful tone.
- Use plain language for clarity.

B. Compose your message.
- Choose strong words that communicate efficiently.
- Pay attention to the connotative meaning of your words.
- Balance abstract and concrete terms to convey your meaning accurately.
- Avoid clichés and trendy buzzwords.
- Use jargon only when your audience understands it and prefers it.
- Vary your sentence structure for impact and interest.
- Develop coherent, unified paragraphs.
- Use transitions generously to help your audience follow your message.
- As needed, adapt your writing for the limitations of mobile devices.


Guidelines for Communicating on Mobile Platforms (Version 2.1c)

Final Corporate-Approved (Version 2.1c) Guidelines for Communicating on Mobile Platforms

As customers, colleagues, and other stakeholders increasingly adopt mobile devices, we continue to revise our guidelines for successful written communication. Version 2.1c simplifies previous versions to focus on five essential points (see sidebar). One obvious adaptation to make for audiences using mobile devices is to modify the design and layout of your messages to fit smaller screen sizes and different user interface features. However, modifying your approach to writing is also an important step. Reading is more difficult on small screens, and consequently users' ability to comprehend what they read on mobile devices is lower than it is on larger screens.

Writing for Mobile: The Five Essentials

- Use a linear organization
- Prioritize information
- Write shorter and more-focused messages and documents
- Use shorter subject lines and headings
- Use shorter paragraphs

Use the following five techniques to make your mobile messages more effective.

The importance of structuring messages and documents with a linear flow

In a printed document or on a larger screen, readers can easily take in multiple elements on a page, such as preview or summary boxes, tables and other supporting visuals, and sidebars with related information. All these elements are in view at the same time, so readers can jump around the page to read various parts without feeling lost. However, with small mobile device screens, a complicated organization requires readers to zoom in and out and pan around to see all these elements at readable text sizes. This make reading slower and raises the odds that readers will get disoriented and lose the thread of the message because they can't see the big picture. To simplify reading, organize with a linear flow from the top to the bottom of the message or article.

The need to prioritize information so readers find what they want quickly

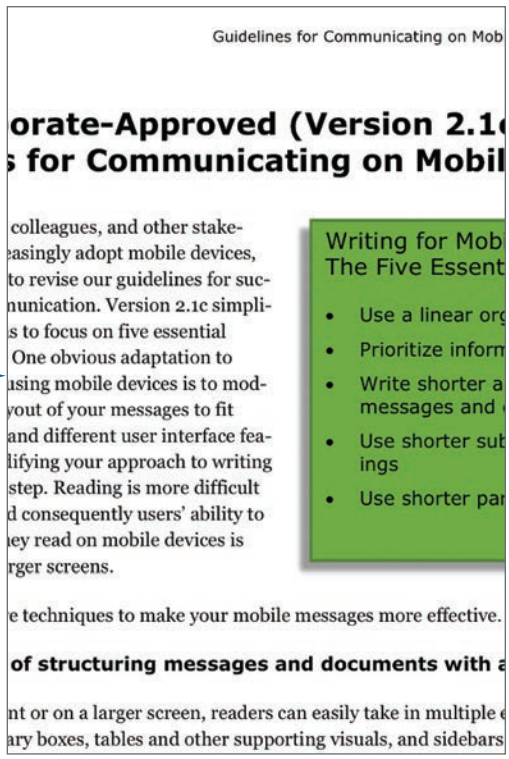
Small screens make it difficult for readers to scan the page to find the information they want most. Prioritize the information based on what you know about their needs and put that information first. Use the *inverted pyramid* style favored by journalists, in which you reveal the most important information briefly at first and then provide successive layers of detail that readers can consume if they want. Note that you may need to avoid using the indirect approach if your message is complicated, because it will be more difficult to readers to follow your chain of reasoning.

Why shorter and more-focused messages and documents are key

Mobile users often lack the patience or opportunity to read lengthy messages or documents, so keep it short. In some cases, this could require you to write two documents, a shorter executive summary for mobile use and a longer supporting document that readers can access with their PCs if they want more details.

The text from this conventional report page is too small to read on a phone screen.

However, zooming in to read forces the reader to lose context and repeatedly hunt around to find all the pieces of the page.


Guidelines for Communicating on Mob

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to revise our guidelines for suc-
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Figure 5.5a

Figure 5.5b

Optimizing for mobile includes writing short headlines that get right to the point.

This introduction conveys only the information readers need in order to grasp the scope of the article.

All the key points of the document appear here on the first screen.

Readers who want more detail can swipe down for background information on the five points.

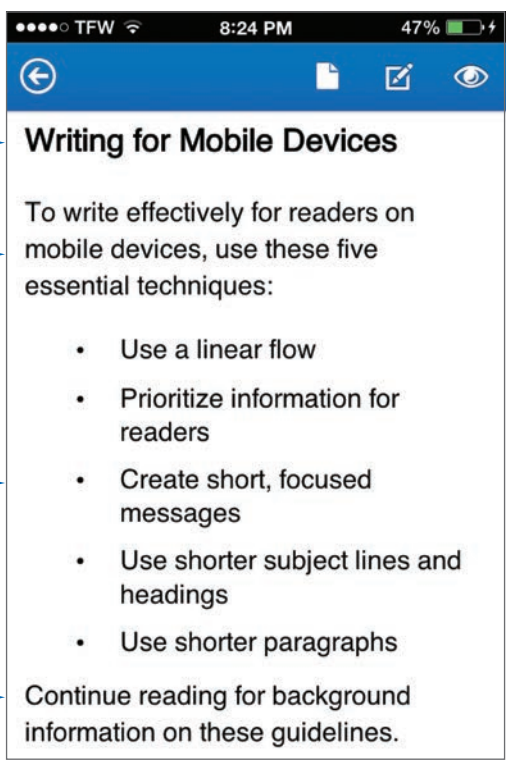


Figure 5.5c

Figure 5.5 Writing for Mobile Devices

Messages and documents created for printed pages and full-sized screens can be difficult and frustrating on mobile devices. For mobile audiences, rewrite with short headlines and concise, linear content—notice how much easier Figure 5.5c is to read.

difficult. A good rule of thumb is to keep subject lines and headlines to around 25 characters.[22] This doesn't give you much text to work with, so make every word count and make sure you start with the key words so readers can instantly see what the subject line or heading is about.[23]

- **Use shorter paragraphs.** In addition to structuring a message according to discrete blocks of information, paragraphs have a visual role in written communication as well. Shorter paragraphs are less intimidating and let readers take frequent "micro rests" as they move through a document. Because far less text is displayed at once on a mobile screen, keep paragraphs as short as possible so readers don't have to swipe through screen after screen before getting to paragraph breaks.

Compare the two messages in Figure 5.5 (see previous page) to get a sense of how to write reader-friendly mobile content.

For a reminder of the tasks involved in writing messages, see "Checklist: Writing Business Messages."

COMMUNICATION CHALLENGES AT Lumen/Kaleigh Moore

Kaleigh Moore recently hired you as a writer/editor to provide clients with social media content and to offer editorial assistance with their own content. Use what you've learned in this chapter to address these writing challenges.

INDIVIDUAL CHALLENGE: A client included the following sentence in a draft that aims to give entrepreneurs a realistic expectation about getting funding from venture capitalists: "Venture capitalists, who fund only a tiny percentage of all new companies, can provide valuable management expertise and industry connections in addition to start-up funds." How would you rewrite the sentence to put more emphasis on the fact that venture capitalists fund very few companies and most entrepreneurs can't count on getting funding from them?

TEAM CHALLENGE: You're reviewing a client's blog post draft that encourages college students who are about to graduate to consider starting a business rather than applying for conventional jobs. The writer has two main reasons for making this suggestion. First, although the job market has been strong for several years now, the economy always experiences fluctuations, and as business evolves, some fields will naturally grow while others stagnate. The writer suggests that some graduates could be forced to take jobs that are outside their intended fields and perhaps below the level of their qualifications. Second, the nature of employment is changing in many professions and industries, and many companies now engage independent contractors for short durations to fill some of their talent needs, rather than exclusively hiring employees for the long term. Which of these statements is the most sensitive to the audience's needs as they relate to this specific topic? Why?

a. Starting your own business offers a degree of freedom that you will never achieve in a conventional corporate job.

b. The job market could slow down in some industries and professions in the coming years as employers find they need different mixes of talent. Chances are you'll end up working as an independent contractor at some point anyway, so you might as well do it now.

c. What could be more fun than creating your own job the minute you graduate?

d. Depending on your career goals and the state of the economy, you might not be able to find the ideal opening when you're ready to graduate. Plus, many traditional jobs are transitioning to contract work. Why not convert a challenge into opportunity and create your own job?

Key Terms

abstract word Word that expresses a concept, quality, or characteristic; abstractions are usually broad

active voice Sentence structure in which the subject performs the action and the object receives the action

bias-free language Language that avoids words and phrases that categorize or stigmatize people in ways related to gender, race, ethnicity, age, or disability

complex sentence Sentence that expresses one main thought (the independent clause) and one or more subordinate, related thoughts (dependent clauses that cannot stand alone as valid sentences)

compound sentence Sentence with two main clauses that express two or more independent but related thoughts of equal importance, usually joined by *and*, *but*, or *or*

compound-complex sentence Sentence with two main clauses, at least one of which contains a subordinate clause

concrete word Word that represents something you can touch, see, or visualize; most concrete terms are related to the tangible, material world

connotative meaning All the associations and feelings evoked by a word

conversational tone The tone used in most business communication; it uses plain language that sounds businesslike without being stuffy at one extreme or too laid-back and informal at the other extreme

credibility A measure of your believability, based on how reliable you are and how much trust you evoke in others

denotative meaning The literal, or dictionary, meaning of a word

euphemisms Words or phrases that express a thought in milder terms

passive voice Sentence structure in which the subject receives the action

simple sentence Sentence with one main clause (a single subject and a single predicate)

style The choices you make to express yourself: the words you select, the manner in which you use those words in sentences, and the way you build paragraphs from individual sentences
tone The overall impression in your messages, created by the style you use
topic sentence Sentence that introduces the topic of a paragraph
transitions Words or phrases that tie together ideas by showing how one thought is related to another

Summary of Learning Objectives

1 Identify the four aspects of being sensitive to audience needs when writing business messages. First, the "you" attitude refers to speaking and writing in terms of your audience's wishes, interests, hopes, and preferences rather than your own. Writing with this attitude is essential to effective communication because it shows your audience that you have their needs in mind, not just your own. Second, good etiquette not only indicates respect for your audience but also helps foster a more successful environment for communication by minimizing negative emotional reaction. Third, sensitive communicators understand the difference between delivering negative news and being negative. Without hiding the negative news, they look for ways to emphasize positive aspects. Fourth, being sensitive includes taking care to avoid biased language that unfairly and even unethically categorizes or stigmatizes people in ways related to gender, race, ethnicity, age, or disability.

2 Identify seven characteristics that build and maintain a communicator's credibility. These seven characteristics are honesty; objectivity; awareness of audience needs; credentials, knowledge, and expertise; endorsements; performance; and sincerity.

3 Explain how to achieve a tone that is conversational but businesslike, explain the value of using plain language, and define *active voice* and *passive voice*. To achieve a tone that is conversational but still businesslike, avoid obsolete and pompous language, avoid preaching and bragging, be careful with intimacy (sharing personal details or adopting an overly casual tone), and be careful with humor. Plain language is a way of presenting information in a simple, unadorned style so that your audience can easily grasp your meaning. By writing and speaking in plain terms, you demonstrate the "you" attitude and show respect for your audience. In the active voice, the subject performs the action and the object receives the action. In the passive voice, the subject receives the action. The passive voice combines the helping verb *to be* with a form of the verb that is usually in the past tense.

4 Describe how to select words that are both correct and effective. To select the best words, first make sure they are correct by checking grammar and usage guides. Then choose words that have few connotations (to reduce the chance of misinterpretation) and no unintended negative connotations (to reduce the chance of offending your audience). Select words that communicate clearly, specifically, and dynamically. Choose words that are strong and familiar, avoid clichés, be extremely careful with buzzwords, and use jargon only when your audience will understand it.

5 Define the four types of sentences, and explain how sentence style affects emphasis within a message. The four types of sentences are simple (one main clause), compound (two main clauses that express independent but related ideas of equal importance), complex (one main clause and one subordinate clause of lesser importance), and compound-complex (two main clauses, at least one of which contains a subordinate clause). Sentence style affects emphasis by playing up or playing down specific parts of a sentence. To emphasize a certain point, you can place it at the end of the sentence or make it the subject of the sentence. To deemphasize a point, put it in the middle of the sentence.

6 Define the three key elements of a paragraph, and list five ways to develop unified, coherent paragraphs. The three key elements of a paragraph are a topic sentence that identifies the subject of the paragraph, support sentences that develop the topic and provide examples and evidence, and transitional words and phrases that help readers connect one thought to the next. Effective paragraphs are both unified (focused on a single idea) and coherent (logically organized). You can develop paragraphs through illustration (giving examples), comparison or contrast (pointing out similarities or differences), cause and effect (giving reasons), classification (discussing categories), and problem and solution (stating a problem and showing how to solve it).

7 List five techniques for writing effective messages for mobile readers. Five techniques for writing effective messages for mobile readers are using a linear organization so readers don't have to jump around the screen to find important message elements; prioritizing information and delivering the most important information first; writing short, focused messages; using short subjects lines and headings; and using short paragraphs.

Test Your Knowledge

To review chapter content related to each question, refer to the indicated Learning Objective.

5-1. What is meant by the "you" attitude? [LO-1]
5-2. What are euphemisms? [LO-1]
5-3. Why is it important to establish your credibility when communicating with people who don't know you or your work? [LO-2]
5-4. In what three situations is the passive voice appropriate? [LO-3]
5-5. How does an abstract word differ from a concrete word? [LO-4]
5-6. How does the denotative meaning of a word differ from its connotative meaning? [LO-4]
5-7. How can you use sentence style to emphasize key thoughts? [LO-5]
5-8. How can topic sentences help readers? [LO-6]
5-9. What functions do transitions serve? [LO-6]
5-10. How does reading comprehension on small, mobile devices compare with comprehension on full-size screens? [LO-7]

Apply Your Knowledge

To review chapter content related to each question, refer to the indicated Learning Objective.

5-11. Why are email, texting, and other forms of digital communication so prone to inadvertent etiquette breakdowns, in which even well-intentioned writers insult or confuse readers? [LO-1]

5-12. Under what circumstances could the use of euphemisms be considered unethical communication? [LO-1]

5-13. When composing business messages, how can you communicate with an authentic voice and project your company's image at the same time? [LO-2]

5-14. Does using plain language make you come across as less of an expert? Explain your answer. [LO-3]

5-15. What steps can you take to make abstract concepts, such as *opportunity*, feel more concrete in your messages? [LO-4]

5-16. Should you bother using transitions if the logical sequence of your message is obvious? Why or why not? [LO-6]

5-17. Why can it be difficult to use the indirect approach for a complex message that will be read on mobile devices? [LO-7]

Practice Your Skills

Message for Analysis

5-18. Creating a Businesslike Tone [LO-1], [LO-3] Read the following email draft and then (a) analyze the strengths and weaknesses of each sentence and (b) revise the document so that it follows this chapter's guidelines. The message was written by the marketing manager of an online retailer of baby-related products in the hope of becoming a retail outlet for Inglesina strollers and high chairs. As a manufacturer of stylish, top-quality products, Inglesina (based in Italy) is extremely selective about the retail outlets through which it allows its products to be sold.

> Our e-tailing site, www.BestBabyGear.com, specializes in only the very best products for parents of newborns, infants, and toddlers. We constantly scour the world looking for products that are good enough and well-built enough and classy enough—good enough to take their place alongside the hundreds of other carefully selected products that adorn the pages of our award-winning website, www.bestbabygear.com. We aim for the fences every time we select a product to join this portfolio; we don't want to waste our time with onesey-twosey products that might sell a half dozen units per annum—no, we want every product to be a top-drawer success, selling at least one hundred units per specific model per year in order to justify our expense and hassle factor in adding it to the above mentioned portfolio. After careful consideration, we thusly concluded that your Inglesina lines meet our needs and would therefore like to add it.

Exercises

Each activity is labeled according to the primary skill or skills you will need to use. To review relevant chapter content, you can refer to the indicated Learning Objective. In some instances, supporting information will be found in another chapter, as indicated.

Writing: Communicating with Sensitivity [LO-1] Substitute a better phrase for each of the following:

5-19. You claim that
5-20. You must update
5-21. It is not our policy to
5-22. You neglected to
5-23. In which you assert
5-24. We are sorry you are dissatisfied
5-25. You failed to enclose
5-26. We request that you send us
5-27. Apparently, you overlooked our terms
5-28. We have been very patient
5-29. We are at a loss to understand

Writing: Demonstrating the "You" Attitude [LO-1] Rewrite these sentences to reflect your audience's viewpoint:

5-30. Your email order cannot be processed; we request that you use the order form on our website instead.
5-31. We insist that you always bring your credit card to the store.
5-32. We want to get rid of all our 15-inch LCD screens to make room in our warehouse for the new 19-, 23-, and 35-inch monitors. Thus, we are offering a 25 percent discount on all sales of 15-inch models this week.
5-33. I am applying for the position of accounting intern in your office. I feel my grades prove that I am bright and capable, and I think I can do a good job for you.
5-34. As requested, we are sending the refund for $25.
5-35. If you cared about doing a good job, you would've made the extra effort required to learn how to use the machinery properly.
5-36. Your strategy presentation this morning absolutely blew me away; there's no way we can fail with all the brilliant ideas you've pulled together—I'm so glad you're running the company now!
5-37. Regarding your email message from September 28 regarding the slow payment of your invoice, it's important for you to realize that we've just undergone a massive upgrade of our accounts payable system and payments have been delayed for everybody, not just you.
5-38. I know I'm late with the asset valuation report, but I haven't been feeling well and I just haven't had the energy needed to work through the numbers yet.
5-39. With all the online news sources available today, I can't believe you didn't know that MyTravel and Thomas Cook were in merger talks—I mean, you don't even have to get up from your computer to learn this!

Writing: Emphasizing the Positive [LO-1] Revise these sentences to be positive rather than negative:

5-40. To avoid damage to your credit rating, please remit payment within 10 days.
5-41. We don't offer refunds on returned merchandise that is soiled.
5-42. Because we are temporarily out of the XL-7 open-ear headphones, we won't be able to ship your order for 10 days.
5-43. You failed to specify the color of the blouse that you ordered.

5-44. You should have realized that waterbeds will freeze in unheated houses during winter. Therefore, our guarantee does not cover the valve damage, and you must pay the $9.50 valve-replacement fee (plus postage).

Writing: Using Unbiased Language [LO-1] Rewrite each of the following to eliminate bias:

5-45. Our division has five of the top ten salesmen in the company.
5-46. He needs a wheelchair, but he doesn't let his handicap affect his job performance.
5-47. A pilot must have the ability to stay calm under pressure, and then he must be trained to cope with any problem that arises.
5-48. Renata Parsons, married and the mother of a teenager, is a top candidate for CEO.
5-49. Even at his age, Sam Nugent is still an active salesman.

5-50. Writing: Establishing Your Credibility; Microblogging Skills [LO-2], Chapter 8 Search LinkedIn for the profile of an expert in any industry or profession. Now imagine that you are going to introduce this person as a speaker at a convention. You will make an in-person introduction at the time of the speech, but you decide to introduce him or her the day before on Twitter. Write four tweets: one that introduces the expert and three that cover three key supporting points that will enhance the speaker's credibility in the minds of potential listeners. Make up any information you need to complete this assignment, and then email the text of your proposed tweets to your instructor.

5-51. Writing: Using Plain Language; Communication Ethics: Making Ethical Choices [LO-3], Chapter 1 Your company has been a major employer in the local community for years, but shifts in the global marketplace have forced some changes in the company's long-term direction. In fact, the company plans to reduce local staffing by as much as 50 percent over the next 5 to 10 years, starting with a small layoff next month. The size and timing of future layoffs have not been decided, although there is little doubt that more layoffs will happen at some point. In the first draft of a letter aimed at community leaders, you write that "this first layoff is part of a continuing series of staff reductions anticipated over the next several years." However, your boss is concerned about the vagueness and negative tone of the language and asks you to rewrite that sentence to read "this layoff is part of the company's ongoing efforts to continually align its resources with global market conditions." Do you think this suggested wording is ethical, given the company's economic influence in the community? Explain your answer in an email message to your instructor.

5-52. Writing: Creating Effective Sentences: Media Skills: Social Networking [LO-4], Chapter 8 If you are interested in business, chances are you've had an idea or two for starting a company. If you haven't yet, go ahead and dream up an idea now. Make it something you are passionate about, something you could really throw yourself into. Now write a four-sentence summary that could appear on the Info tab on a Facebook profile. Make sure the first sentence is a solid topic sentence, and make sure the next three sentences offer relevant evidence and examples. Feel free to make up any details you need. Email your summary to your instructor or post it on your class blog.

Writing: Choosing Powerful Words [LO-4] Write a concrete phrase for each of these vague phrases (make up any details you need):

5-53. Sometime this spring
5-54. A substantial savings
5-55. A large number attended
5-56. Increased efficiency
5-57. Expanded the work area
5-58. Flatten the website structure

Writing: Choosing Powerful Words [LO-4] List terms that are stronger than the following:

5-59. Ran after
5-60. Seasonal ups and downs
5-61. Bright
5-62. Suddenly rises
5-63. Moves forward

Writing: Choosing Powerful Words [LO-4] As you rewrite these sentences, replace the clichés and buzzwords with plain language (for any terms you don't recognize, you can find definitions online):

5-64. Being a jack-of-all-trades, Dave worked well in his new general manager job.
5-65. Moving Leslie into the accounting department, where she was literally a fish out of water, was like putting a square peg into a round hole, if you get my drift.
5-66. My only takeaway from the offsite was that Laird threw his entire department under the bus for missing the deadline.
5-67. I'd love to help you with that project, but I'm bandwidth-constrained.
5-68. The board green-lighted our initiative to repurpose our consumer products for the commercial space.

Writing: Choosing Powerful Words [LO-4] Suggest short, simple words to replace each of the following:

5-69. Inaugurate
5-70. Terminate
5-71. Utilize
5-72. Anticipate
5-73. Assistance
5-74. Endeavor
5-75. Ascertain
5-76. Procure
5-77. Consummate
5-78. Advise
5-79. Alteration
5-80. Forwarded
5-81. Fabricate
5-82. Nevertheless
5-83. Substantial

Writing: Choosing Powerful Words [LO-4] Write up-to-date, less-stuffy versions of these phrases; write "none" if you think there is no appropriate substitute or "delete" if the phrase should simply be deleted:

5-84. As per your instructions
5-85. Attached herewith
5-86. In lieu of
5-87. In reply I wish to state
5-88. Please be advised that

Writing: Creating Effective Sentences [LO-5] Rewrite each sentence so that it is active rather than passive:

5-89. The raw data are entered into the customer relationship management system by the sales representative each Friday.
5-90. High profits are publicized by management.
5-91. The policies announced in the directive were implemented by the staff.
5-92. Our computers are serviced by the Santee Company.
5-93. The employees were represented by Tamika Hogan.

5-94. **Writing: Crafting Unified, Coherent Paragraphs; Collaboration: Evaluating the Work of Others** [LO-6], **Chapter 6** Working with four other students, divide the following five topics among yourselves and each write one paragraph on your selected topic. Be sure each student uses a different technique when writing his or her paragraph: One student should use the illustration technique, one the comparison or contrast technique, one a discussion of cause and effect, one the classification technique, and one a discussion of problem and solution. Then exchange paragraphs within the team and pick out the main idea and general purpose of the paragraph one of your teammates wrote. Was everyone able to correctly identify the main idea and purpose? If not, suggest how the paragraph could be rewritten for clarity.

- Types of DJ equipment available for sale
- Advantages and disadvantages of eating at fast-food restaurants
- Finding that first full-time job
- Good qualities of my car (or house, apartment, or neighborhood)
- How to make a dessert (or barbecue a steak or make coffee)

Writing: Using Transitions [LO-6] Add transitional elements to the following paragraphs to improve the flow of ideas. (Note: You may need to eliminate or add some words to smooth out your sentences.)

5-95. Facing some of the toughest competitors in the world, Harley-Davidson had to make some changes. The company introduced new products. Harley's management team set out to rebuild the company's production process. New products were coming to market and the company was turning a profit. Harley's quality standards were not on par with those of its foreign competitors. Harley's costs were still among the highest in the industry. Harley made a U-turn and restructured the company's organizational structure. Harley's efforts have paid off.

5-96. Whether you're indulging in a doughnut in New York or California, Krispy Kreme wants you to enjoy the same delicious taste with every bite. The company maintains consistent product quality by carefully controlling every step of the production process. Krispy Kreme tests all raw ingredients against established quality standards. Every delivery of wheat flour is sampled and measured for its moisture content and protein levels. Krispy Kreme blends the ingredients. Krispy Kreme tests the doughnut mix for quality. Krispy Kreme delivers the mix to its stores. Financial critics were not always as kind to the company as food critics have been. At one point, allegations of improper financial reporting left the company's future in doubt. It is back on solid ground today.

5-97. **Media Skills: Writing for Mobile Devices** [LO-7] Find an interesting website article or blog post on any business topic. Write a three-paragraph summary that would be easy to read on a phone screen.

Expand Your Skills

Critique the Professionals

Locate an example of professional communication from a reputable online source. Choose a paragraph that has at least three sentences. Evaluate the effectiveness of this paragraph at three levels, starting with the paragraph structure. Is the paragraph unified and cohesive? Does it have a clear topic sentence and enough support to clarify and expand on that topic? Second, evaluate each sentence. Are the sentences easy to read and easy to understand? Did the writer vary the types and lengths of sentences to produce a smooth flow and rhythm? Is the most important idea presented prominently in each sentence? Third, evaluate at least six word choices. Did the writer use these words correctly and effectively? Using whatever medium your instructor requests, write a brief analysis of the piece (no more than one page), citing specific elements from the piece and support from the chapter.

Sharpening Your Career Skills Online

Find a website, video, article, podcast, or presentation that offers advice on writing effective sentences. Write a brief email message to your instructor describing the item that you found and summarizing the career skills information you learned from it.

Build Your Career

With the Story of You (see Chapter 4's Build Your Career) to guide your career planning effort, you're ready to start building an authentic personal brand. As "Building Your Personal Brand" on page xxxvii in the Prologue discusses, you've probably heard the advice that you should create a personal brand for your career—and you may have reacted negatively to the advice. You'll also find some advice out there that isn't terribly helpful for coming up with a brand that is both useful and authentic. Take a few moments to read this section of the Prologue to get a sense of how building your brand in a deep and thoughtful way can help you throughout your career.

Here and in the next two chapters, you can construct your *brand pyramid* (see Figure 2 in the Prologue), which has all the relevant support points needed to build a personal brand message or professional promise, whichever you prefer to call it.

Start by compiling a *private inventory* of skills, attributes, experience, and areas for improvement. This should be a positive but realistic assessment of what you have to offer now and a "to-grow" list of areas where you want to develop or improve. (Obviously, this inventory isn't for public consumption—it's for your planning purposes only.)

As much as possible, provide evidence to back up each quality you list. If you are diligent and detail oriented, for instance, identify a time that you saved a project by methodically analyzing the situation to find a problem that others had overlooked. If you are a creative thinker, identify a time when you came up with an unusual new idea at work. The more evidence you can provide, the better. With your inventory in hand, you can move on to the Build Your Career activity in Chapter 6, where you will distill a *public profile* from your private inventory.

Five-Minute Guide to Composing a Business Message or Document

After you've completed the planning tasks and you're ready to start writing, spend five minutes reviewing these tips before you start composing.

00:01

Be sure to adapt to your audience

1. Use the "you" attitude—make it about the reader.
2. Maintain professional standards of etiquette and emphasize the positive, wherever appropriate.
3. Use bias-free language.
4. Plan to establish your credibility if needed.
5. Think about how you'll project your company's image, if relevant.
6. Remember to craft the right tone for the situation (conversational or more formal).
7. Emphasize plain language and make effective use of active and passive voice.

00:02

Think about choosing powerful words

1. Remember to use the right words and use them correctly; verify the meaning and correct usage of any word you're not sure about.
2. Think about making the most-effective word and phrase choices.

00:03

Get ready to create effective sentences

1. Choose from the four types of sentences (simple, compound, complex, compound-complex), using each type to maximum advantage.
2. Use various sentence styles to emphasize key thoughts, such as putting the most important point (or the dependent clause in a complex sentence) at the beginning or the end of the sentence.
3. Use a variety of short, medium, and long sentences to match the size and shape of your ideas and to give your writing some variety.

00:04

Think about how you will craft unified, coherent paragraphs

1. Every paragraph should be *unified*—focusing on a single topic—and *coherent*—presenting ideas in a logically connected way.
2. Start each paragraph with a clear topic sentence that presents the main idea of the paragraph.
3. Support, justify, or extend that idea with supporting sentences.
4. Use transitions within and between paragraphs to help readers follow your train of thought.
5. Use multiple techniques to develop paragraphs: illustration, comparison or contrast, cause and effect, classification, and problem and solution.

00:05

Modify your approach for mobile audiences.

1. Use a linear organization, with a single path for the eye to follow.
2. Prioritize the information so readers get the most valuable information as quickly as possible.
3. Write shorter and more-focused messages and documents—remember that reading on mobile devices is more difficult and more prone to errors than reading on paper or large screens.
4. For email messages and blog posts, use short subject lines and headings so that they display in full on the screen, if possible.
5. Use shorter paragraphs to give readers more visual breaks.

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6 Completing Business Messages

LEARNING OBJECTIVES

After studying this chapter, you will be able to

1. Discuss the value of careful revision, and describe the tasks involved in evaluating your first drafts and the work of other writers.
2. List four techniques you can use to improve the readability of your messages.
3. Describe eight steps you can take to improve the clarity of your writing, and give four tips on making your writing more concise.
4. List four principles of effective design, and explain the role of major design elements in document readability.
5. Explain the importance of proofreading, and give seven tips for successful proofreading.
6. Discuss the most important issues to consider when distributing your messages.



Veronika Burian

Designers José Scaglione and Veronika Burian focus on creating typefaces that are easy to read in lengthy stretches of text but that still display fresh and unique personalities.

COMMUNICATION CLOSE-UP AT

Type Together

www.type-together.com

Take a moment to look at the variety of textual messages all around you, from this book to whatever posters and signs might be in view to the displays on mobile devices. Wherever text is presented in print or digital form, someone had to make a decision about which typeface to use for each string of text. And behind the scenes, somebody designed every character of every typeface. (*Font* and *typeface* are often used interchangeably, although strictly speaking, a font is a set of characters that use a given typeface design.)

Typefaces aren't something most people think about very often, but they can have considerable influence on the success of a written message. Type design can contribute to or detract from a message in two major ways: readability and personality. Naturally, readability is essential. If people can't accurately read the words on the page or screen, they won't interpret a message as intended. If a typeface is legible but difficult to read for more than a few words, readers will tend to give up and never finish the document.

Personality is more subtle but also important because the "look and feel" of a typeface sends a nonverbal message along with the verbal message. Various typefaces can convey a wide range of these nonverbal messages, from serious and formal to casual and even playful. Just like showing up for a job interview in wildly inappropriate clothing, using a typeface with the wrong personality can detract from a well-written message. And as you can see from studying a variety of typefaces, personality needs to be balanced with readability; some typefaces with "strong" personalities can be difficult to read. Personality is so important that some companies commission their own custom typefaces that become integral elements of their overall brand presence.

Type design has been an active art form for hundreds of years, and many contemporary designs are the result of efforts to adapt classic designs to contemporary uses. For some designs, this modernization is an effort to improve a typeface's readability or update its visual presence. For others, the modernization has a more technical aspect, creating typefaces that work more successfully with digital print or display technologies. For instance, the Georgia typeface was created in the 1990s primarily as a solution for that era's lower-resolution computer screens, although, thanks to its attractive readability, it is still a popular choice today.

Although thousands of typefaces are now available, type design remains a vibrant artistic profession, with new designs

appearing all the time. Veronika Burian and José Scaglione are among the latest generation of designers lending their talents to the ageless challenge of balancing readability and personality. Their type foundry Type Together, based in the Czech Republic capital of Prague, specializes in *editorial typefaces*—those used for long blocks of text such as in newspapers and books. (As a nod to the days when all typefaces were made from metal, type design studios are still referred to as *foundries*.)

Burian and Scaglione focus on the challenge of making type that is highly readable while offering fresh new personalities and meeting the technical demands of contemporary digital publishing. As individual designers and together as the cofounders of Type Together, Burian and Scaglione have received international recognition for their designs and their contributions to the art of type design through workshops, teaching, and publications. Their commissioned work has ranged from customizing e-reader type for Apple's iBooks to creating a font that Levi's could use in multiple languages for a global ad campaign.

Your business audiences may not think about typefaces often, but their responses to your messages and documents depend more than they might imagine on the efforts of type designers such as Burian and Scaglione—and on your skill in using their designs.[1]

Revising Your Message: Evaluating the First Draft

1 LEARNING OBJECTIVE

Discuss the value of careful revision, and describe the tasks involved in evaluating your first drafts and the work of other writers.

Veronika Burian and José Scaglione (profiled in the chapter-opening Communication Close-Up) lend their creativity and talents to an essential stage of the writing process—producing professional-quality documents that convey the intended message both verbally and nonverbally. You'll read more about document design and production, including choosing and using typefaces, later in the chapter.

Before getting to the design stage, though, it's important to fine-tune the content you've diligently researched, organized, and composed. Successful communicators recognize that the first draft is rarely as tight, clear, and compelling as it needs to be. Careful revision can mean the difference between a rambling, unfocused message and a lively, direct message that gets results.

Check out the "Five-Minute Guide to Revising and Proofreading" at the end of the chapter.

The scope of revision can vary, depending on the medium and the message. For informal messages to internal audiences, particularly when using workgroup messaging, text messaging, or email, the revision process is often as simple as quickly looking over your message to correct any mistakes before sending or posting it. However, don't fall into the common trap of thinking that you don't need to worry about grammar, spelling, clarity, and other fundamentals of good writing when you use digital media. These qualities can be even more important in digital media, particularly if these messages are the only contact your audience has with you. Audiences are likely to equate the quality of your writing with the quality of your thinking. Poor-quality messages create an impression of poor-quality thinking and can cause confusion, frustration, and costly delays.

For important messages, schedule time to put your draft aside for a day or two before you begin the revision process.

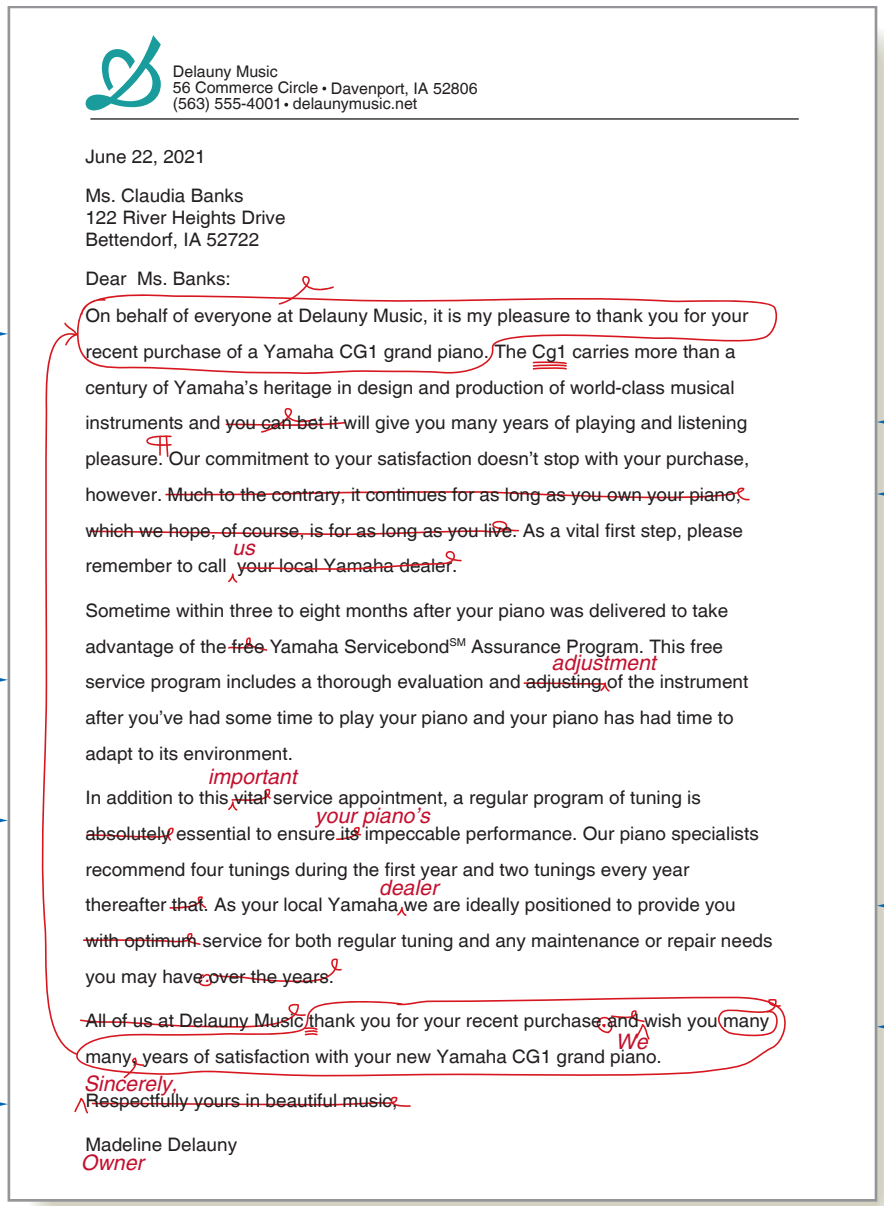
Particularly with important messages, try to arrange your work schedule so you can put your first draft aside for a day or two before you begin the revision process. Doing so will allow you to approach the material with a fresh eye. Then start with the "big picture," making sure that the document accomplishes your overall goals before moving to finer points, such as readability, clarity, and conciseness. Compare the letters in Figures 6.1 and 6.2 on the next two pages for an example of how careful revision improves a customer letter.

EVALUATING YOUR CONTENT, ORGANIZATION, STYLE, AND TONE

When you begin the revision process, focus your attention on content, organization, style, and tone. To evaluate the content of your message, ask yourself these questions:

Start your evaluation by verifying that you have the right information in place.

- Is the information accurate?
- Is the information relevant to the audience?
- Is there enough information to satisfy the readers' needs?



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56 Commerce Circle • Davenport, IA 52806
(563) 555-4001 • delaunymusic.net

June 22, 2021

Ms. Claudia Banks
122 River Heights Drive
Bettendorf, IA 52722

Dear Ms. Banks:

On behalf of everyone at Delauny Music, it is my pleasure to thank you for your recent purchase of a Yamaha CG1 grand piano. The Cg1 carries more than a century of Yamaha's heritage in design and production of world-class musical instruments and ~~you can bet it~~ will give you many years of playing and listening pleasure. Our commitment to your satisfaction doesn't stop with your purchase, however. ~~Much to the contrary, it continues for as long as you own your piano, which we hope, of course, is for as long as you live.~~ As a vital first step, please remember to call us ~~your local Yamaha dealer~~.

Sometime within three to eight months after your piano was delivered to take advantage of the ~~free~~ Yamaha Servicebond℠ Assurance Program. This free service program includes a thorough evaluation and ~~adjusting~~ adjustment of the instrument after you've had some time to play your piano and your piano has had time to adapt to its environment.

In addition to this ~~vital~~ important service appointment, a regular program of tuning is ~~absolutely~~ essential to ensure its your piano's impeccable performance. Our piano specialists recommend four tunings during the first year and two tunings every year thereafter ~~that~~. As your local Yamaha dealer we are ideally positioned to provide you ~~with optimum~~ service for both regular tuning and any maintenance or repair needs you may have ~~over the years~~.

~~All of us at Delauny Music~~ thank you for your recent purchase and ~~wish~~ We wish you many many years of satisfaction with your new Yamaha CG1 grand piano.

Sincerely,
~~Respectfully yours in beautiful music,~~

Madeline Delauny
Owner

The two circled sentences say essentially the same thing, so this edit combines them into one sentence.

Changing *adjusting* to *adjustment* makes it parallel with *evaluation*.

Replacing *its* with *your piano's* avoids any confusion about which noun *it* is supposed to replace.

The simple complimentary close replaces a close that was stylistically over the top.

The phrase *you can bet* is too informal for this message.

The sentence beginning with "Much to the contrary . . . " is awkward and unnecessary.

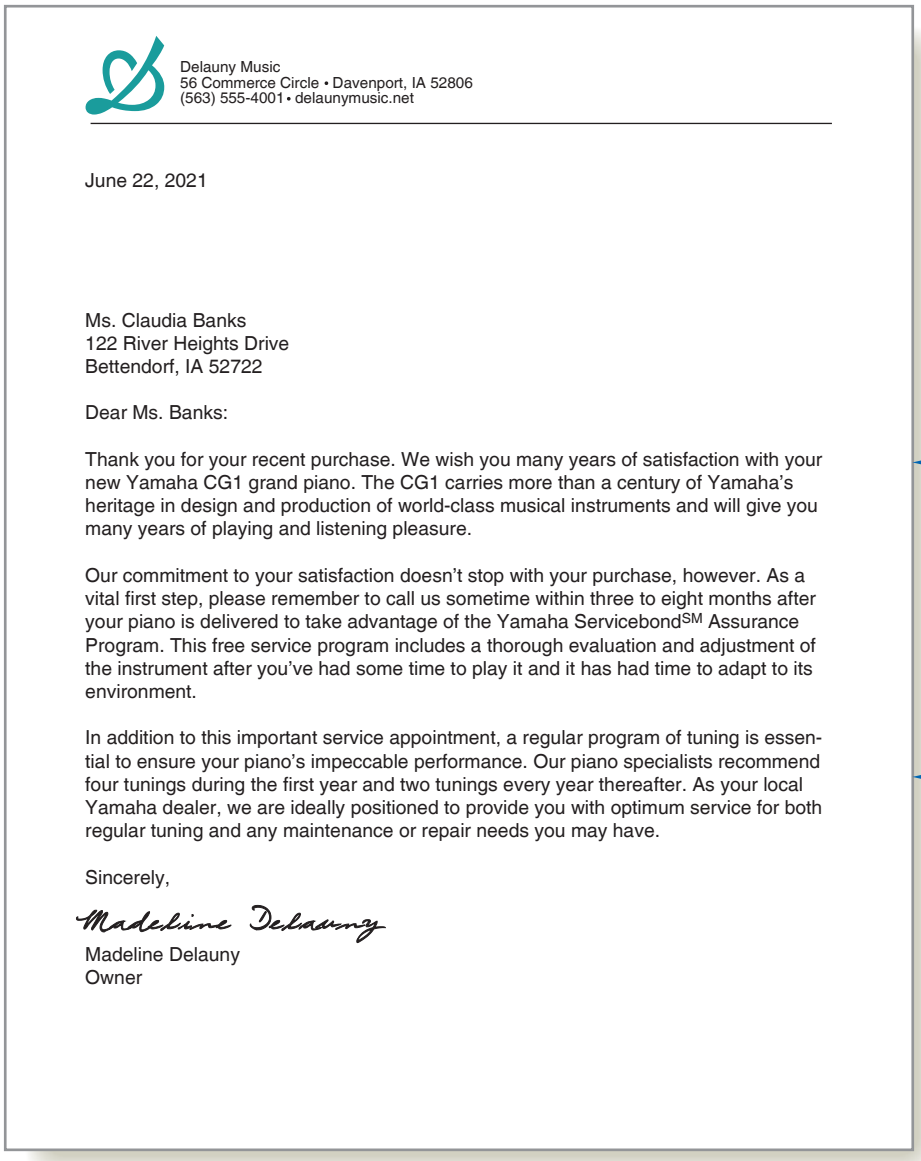
This edit inserts a missing word (*dealer*).

This group of edits removes unnecessary words in several places.

Common Proofreading Symbols (see page 608 for more)

~~strikethrough~~	Delete text
⌒	Delete individual character or a circled block of text
∧	Insert text (text to insert is written above)
⊙	Insert period
∧	Insert comma
⌐	Start new line
¶	Start new paragraph
≡	Capitalize

Figure 6.1 Improving a Customer Letter Through Careful Revision
Careful revision makes this draft shorter, clearer, and more focused. The proofreading symbols you see here are still widely used whenever printed documents are edited and revised; you can find a complete list of symbols in Appendix C. Note that many business documents are now "marked up" using such tools as revision marks in Microsoft Word and comments in Adobe Acrobat. No matter what the medium, however, careful revision is key to more-effective messages.



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June 22, 2021

Ms. Claudia Banks
122 River Heights Drive
Bettendorf, IA 52722

Dear Ms. Banks:

Thank you for your recent purchase. We wish you many years of satisfaction with your new Yamaha CG1 grand piano. The CG1 carries more than a century of Yamaha's heritage in design and production of world-class musical instruments and will give you many years of playing and listening pleasure.

Our commitment to your satisfaction doesn't stop with your purchase, however. As a vital first step, please remember to call us sometime within three to eight months after your piano is delivered to take advantage of the Yamaha Servicebond℠ Assurance Program. This free service program includes a thorough evaluation and adjustment of the instrument after you've had some time to play it and it has had time to adapt to its environment.

In addition to this important service appointment, a regular program of tuning is essential to ensure your piano's impeccable performance. Our piano specialists recommend four tunings during the first year and two tunings every year thereafter. As your local Yamaha dealer, we are ideally positioned to provide you with optimum service for both regular tuning and any maintenance or repair needs you may have.

Sincerely,

Madeline Delauny

Madeline Delauny
Owner

Figure 6.2 Professional Business Letter
Here is the revised and finished version of the edited letter from Figure 6.1. Note that the *block format* used here is just one of several layout options; Appendix A also describes the *modified block format* and the *simplified format*.

- Is there a good balance between general information (giving readers enough background information to appreciate the message) and specific information (giving readers the details they need to understand the message)?

When you are satisfied with the content of your message, you can review its organization. Ask yourself another set of questions:

Continue your evaluation by verifying that the information is presented in a tight, logical manner.

- Are all the points covered in the most logical order?
- Do the most important ideas receive the most space, and are they placed in the most prominent positions?
- Would the message be more convincing if it were arranged in a different sequence?
- Are any points repeated unnecessarily?
- Are details grouped together logically, or are some still scattered throughout the document?

Next, consider whether you have achieved the right tone for your audience. Is your writing formal enough to meet the audience's expectations without being too formal or academic? Is it too casual for a serious subject?

Spend a few extra moments on the beginning and end of your message; these sections usually have the greatest impact on the audience. Be sure that the opening is relevant, interesting, and geared to the reader's probable reaction. In longer messages, make sure the first few paragraphs establish the subject, purpose, and organization of the material. Review the conclusion to be sure that it summarizes the main idea and leaves the audience with a positive impression.

Give the beginning and the end of your document extra attention.

EVALUATING, EDITING, AND REVISING THE WORK OF OTHERS

At many points in your career, you will be asked to evaluate, edit, and sometimes revise the work of others. Whether you're suggesting improvements or making the improvements yourself (as you might on a wiki site, for example), you can make a contribution by using all the skills you are learning in Chapters 4 through 6.

Before you dive into someone else's work, recognize the dual responsibility that you have. First, unless you've specifically been asked to rewrite something in your own style, keep in mind that your job is to help the other writer succeed at his or her task, not to impose your writing style. Second, make sure you understand the writer's intent before you begin suggesting or making changes. With those thoughts in mind, ask yourself the following questions as you evaluate someone else's writing:

When you evaluate, edit, or revise someone else's work, remember that your job is to help that person succeed, not to impose your own style.

- What is the purpose of this document or presentation?
- Who is the target audience?
- What information does the audience need?
- Are there any special circumstances or sensitive issues that the writer had to consider (or should have considered)?
- Does the document provide this information in a well-organized way?
- Does the writing demonstrate the "you" attitude toward the audience?
- Is the tone of the writing appropriate for the audience and the situation?
- Can the readability be improved?
- Is the writing clear? If not, how can it be improved?
- Is the writing as concise as it could be?
- Does the page or screen design support the intended message?

You can read more about using these skills in the context of wiki writing in Chapter 8.

Revising to Improve Readability

2 LEARNING OBJECTIVE
List four techniques you can use to improve the readability of your messages.

After confirming the content, organization, style, and tone of your message, make a second pass to improve *readability*. Most professionals are inundated with more reading material than they can ever hope to consume, and they'll appreciate your efforts to make your documents easier to read. You'll benefit from this effort, too: If you earn a reputation for creating well-crafted documents that respect the audience's time, people will pay more attention to your work.

You may be familiar with one of the indexes that have been developed over the years in the attempt to measure readability. The Flesch-Kincaid Grade Level score computes reading difficulty relative to U.S. grade-level achievement. For instance, a score of 10 suggests that a document can be read and understood by the average 10th grader. The Flesch Reading Ease score, a similar scoring system, ranks documents on a 100-point scale. Higher scores suggest that the document should be easier to read, based on word size and sentence length. If these measurements aren't built into your word-processing software, you can find a number of calculators for various indexes online.

Readability indexes can give you a rough idea of the complexity of a piece, but they can't evaluate its true reading quality.

Readability indexes offer a useful reference point, but they are limited by what they are able to measure: word length, number of syllables, sentence length, and paragraph length. They can't measure any of the other factors that affect readability, such as

document design, the "you" attitude, clear sentence structure, smooth transitions, and proper word usage. Compare these two paragraphs:

> Readability indexes offer a useful reference point, but they are all limited by what they are able to measure: word length, number of syllables, sentence length, and paragraph length. They can't measure any of the other factors that affect readability, from "you" orientation to writing clarity to document design.

> Readability indexes can help. But they don't measure everything. They don't measure whether your writing clarity is good. They don't measure whether your document design is good or not. Reading indexes are based on word length, syllables, sentences, and paragraphs.

The second paragraph scores much better on both grade level and reading ease, but it is choppy, unsophisticated, and poorly organized. As a general rule, then, don't assume that a piece of text is readable if it scores well on a readability index—or that it is difficult to read if it doesn't score well.

Beyond using shorter words and simpler sentences, you can improve the readability of a message by making the document interesting and easy to skim. Most business audiences—particularly influential senior managers—tend to skim documents, looking for key ideas, conclusions, and recommendations. If they think a document contains valuable information or requires a response, they will read it more carefully when time permits. Four techniques will make your message easier to read and easier to skim: varying sentence length, using shorter paragraphs, using lists and bullets instead of narrative, and adding effective headings and subheadings.

VARYING THE LENGTH OF YOUR SENTENCES

To keep readers' interest, look for ways to combine a variety of short, medium, and long sentences.

Varying the length of your sentences is a creative way to make your messages interesting and readable. By choosing words and sentence structure with care, you can create a rhythm that emphasizes important points, enlivens your writing style, and makes information more appealing to your reader. For example, a short sentence that highlights a conclusion at the end of a substantial paragraph of evidence makes your key message stand out. Try for a mixture of sentences that are short (up to 15 words or so), medium (15–25 words), and long (more than 25 words).

Each sentence length has its advantages. Short sentences can be processed quickly and are easier for nonnative speakers and translators to interpret. Medium-length sentences are useful for showing the relationships among ideas. Long sentences are often the best for conveying complex ideas, listing multiple related points, or summarizing or previewing information.

Be aware that each sentence length also has disadvantages. Too many short sentences in a row can make your writing choppy. Medium sentences can lack the punch of short sentences and the informative power of longer sentences. Long sentences can be difficult to understand because they contain more information and usually have a more complicated structure. Because readers can absorb only a few words per glance, longer sentences are also more difficult to skim. By choosing the best sentence length for each communication need and remembering to mix sentence lengths for variety, you'll get your points across while keeping your messages lively and interesting.

KEEPING YOUR PARAGRAPHS SHORT

Short paragraphs are more inviting and tend to be easier to read.

Large blocks of text can be visually daunting, particularly on-screen and even more so on small mobile devices, so the optimum paragraph length is short to medium in most cases. Unless you break up your thoughts somehow, you'll end up with lengthy paragraphs that are guaranteed to intimidate even the most dedicated reader. Short paragraphs, generally 100 words or fewer (this paragraph has 92 words), are easier to read than long ones, and they make your writing look inviting. You can also emphasize ideas by isolating them in short, forceful paragraphs.

DEVELOPING AS A PROFESSIONAL

Being Dependable and Accountable

By any definition, a "pro" is somebody who gets the job done. Develop a reputation as somebody people can count on. This means meeting your commitments, including keeping on schedule and staying within budgets. These are skills that take some time to develop as you discover how much time and money are required to accomplish various tasks and projects. With experience, you'll learn to be conservative with your commitments. You don't want to be known as someone who overpromises and underdelivers.

If you can't confidently predict how long a project will take or how much it will cost, be sure to let your client, colleagues, or supervisor know that. And if changing circumstances threaten your ability to meet a previous commitment, be sure to share that information with anyone who might be affected by your performance.

Being accountable also means owning up to your mistakes and learning from failure so that you can continue to improve. Pros don't make excuses or blame others. When they make mistakes—and everybody does—they face the situation head-on, make amends, and move on.

CAREER APPLICATIONS

1. What steps could you take to make realistic commitments on tasks and projects in which you have little or no experience?
2. Does being accountable mean you never make mistakes? Explain your answer.

However, don't go overboard with short paragraphs. In particular, be careful to use one-sentence paragraphs only occasionally and usually only for emphasis. Also, if you need to divide a subject into several pieces to keep paragraphs short, be sure to help your readers keep the ideas connected by guiding them with plenty of transitional elements.

USING LISTS AND BULLETS TO CLARIFY AND EMPHASIZE

Lists are effective tools for highlighting and simplifying material.

An effective alternative to using conventional sentences is to set off important ideas in a list—a series of words, names, or other items. Lists can show the sequence of your ideas, heighten their visual impact, and increase the likelihood that a reader will find key points. In addition, lists help simplify complex subjects, highlight main points, visually break up a page or screen, ease the skimming process for busy readers, and give readers a breather. Compare these two treatments of the same information:

Narrative

Owning your own business has many potential advantages. One is the opportunity to pursue your own personal passion. Another advantage is the satisfaction of working for yourself. As a sole proprietor, you also have the advantage of privacy because you do not have to reveal your financial information or plans to anyone.

List

Owning your own business has three advantages:

- Opportunity to pursue personal passion
- Satisfaction of working for yourself
- Financial privacy

You can separate list items with numbers, letters, or *bullets* (a general term for any kind of graphical element that precedes each item). Bullets are generally preferred over numbers, unless the list is in some logical sequence or ranking or you need to refer to specific list items elsewhere in the document.

Lists are easier to locate and read if the entire numbered or bulleted section is set off by a blank line before and after. Furthermore, make sure to introduce lists clearly so that people know what they're about to read. One way to introduce lists is to make them a part of the introductory sentence:

The board of directors met to discuss the revised annual budget. To keep expenses in line with declining sales, the directors voted to

- Cut everyone's salary by 10 percent
- Close the employee cafeteria
- Reduce travel expenses

Another way to introduce a list is to precede it with a complete introductory sentence, followed by a colon:

The decline in company profit is attributable to four factors:

- Slower holiday sales
- Increased transportation and fuel costs
- Higher employee wages
- Slower inventory turnover

Keep your list items parallel to make them easier to read.

Regardless of the format you choose, the items in a list should be parallel; that is, they should all use the same grammatical pattern. For example, if one list item begins with a verb, every item should begin with a verb. If one item is a noun phrase, all should be noun phrases.

Nonparallel List Items (a mix of verb and noun phrases)

- Improve our bottom line
- Identification of new foreign markets for our products
- Global market strategies
- Issues regarding pricing and packaging size

Parallel List Items (all verb phrases)

- Improving our bottom line
- Identifying new foreign markets for our products
- Developing our global market strategies
- Resolving pricing and packaging issues

Parallel forms are easier to read and skim. You can create parallelism by repeating the pattern in words, phrases, clauses, or entire sentences (see Table 6.1).

ADDING HEADINGS AND SUBHEADINGS

A *heading* is a brief title that tells readers about the content of a major section; *subheadings* are subordinate to headings and indicate subsections within a major section.

Use headings to grab the reader's attention and organize material into sections.

A **heading** is a brief title that tells readers about the content of the section that follows. **Subheadings** are subordinate to headings, indicating subsections within a major section. Headings and subheadings serve these important functions:

- **Organization.** Headings show your reader at a glance how the document is organized. They act as labels to group related paragraphs and organize lengthy material into shorter sections.
- **Attention.** Informative, inviting, and in some cases intriguing headings grab the reader's attention, make the text easier to read, and help the reader find the parts he or she needs to read—or skip.
- **Connection.** Using headings and subheadings together helps readers see the relationship between main ideas and subordinate ones so that they can understand your message more easily. Moreover, headings and subheadings visually indicate shifts from one idea to the next.

TABLE 6.1 Achieving Parallelism

Method	Example
Parallel words	The plan was approved by Clausen, Whittaker, Merlin, and Carlucci.
Parallel phrases	We are gaining market share in supermarkets, in department stores, and in specialty stores.
Parallel clauses	I'd like to discuss the issue after Vicki gives her presentation but before Marvin shows his slides.
Parallel sentences	In 2018 we exported 30 percent of our production. In 2019 we exported 50 percent.

Descriptive headings, such as "Cost Considerations," identify a topic but do little more. **Informative headings**, such as "Redesigning Material Flow to Cut Production Costs," guide readers to think in a certain way about the topic. They are also helpful in guiding your work as a writer, especially if cast as questions you plan to address in your document. Well-written informative headings are self-contained, which means readers can read just the headings and subheadings and understand them without reading the rest of the document. For example, "Introduction" conveys little information, whereas the heading "Staffing Shortages Cost the Company $150,000 Last Year" provides a key piece of information and captures the reader's attention. Whatever types of headings you choose, keep them brief and use parallel construction throughout the document.

Descriptive headings identify a topic but do little more; *informative headings* guide readers to think in a certain way about the topic.

Editing for Clarity and Conciseness

After you've reviewed and revised your message for readability, your next step is to make sure your message is as clear and as concise as possible.

3 LEARNING OBJECTIVE
Describe eight steps you can take to improve the clarity of your writing, and give four tips on making your writing more concise.

EDITING FOR CLARITY

Check to see that every sentence conveys the message you intend and that readers can extract that meaning without needing to read it more than once. To ensure clarity, look closely at your paragraph organization, sentence structure, and word choices (review Chapter 5 if necessary). Can readers make sense of the related sentences in a paragraph? Is the meaning of each sentence easy to grasp? Is each word clear and unambiguous (meaning it doesn't have any risk of being interpreted in more than one way)? See Table 6.2 for examples of the following tips:

Clarity is essential to getting your message across accurately and efficiently.

- **Break up overly long sentences.** If you find yourself stuck in a long sentence, you're probably trying to make the sentence do more than it reasonably can, such as expressing two dissimilar thoughts or peppering the reader with too many pieces of supporting evidence at once. (Did you notice how difficult this long sentence was to read?)
- **Rewrite hedging sentences.** *Hedging* means pulling back from making an absolutely certain, definitive statement about a topic. Granted, sometimes you have to write *may* or *seems* to avoid stating a judgment as a fact. When you hedge too often or without good reason, however, you come across as being unsure of what you're saying.

Hedging is appropriate when you can't be absolutely sure of a statement, but excessive hedging undermines your authority.

- **Impose parallelism.** As noted earlier, making your writing *parallel* means expressing two or more similar ideas using the same grammatical structure. Doing so helps your audience understand that the ideas are related, are of similar importance, and are on the same level of generality. Parallel patterns are also easier to read. You can impose parallelism by repeating a pattern in words, phrases, clauses, or entire sentences.

When you use parallel grammatical patterns to express two or more ideas, you show that they are comparable thoughts.

- **Correct dangling modifiers.** Sometimes a modifier is not just an adjective or an adverb but an entire phrase modifying a noun or a verb. Be careful not to leave this type of modifier *dangling*, with no connection to the subject of the sentence.
- **Reword long noun sequences.** When multiple nouns are strung together as modifiers, the resulting sentence can be hard to read. See whether a single, well-chosen word will do the job. If the nouns are all necessary, consider moving one or more to a modifying phrase, as shown in Table 6.2.
- **Replace camouflaged verbs.** Watch for words that end in *ion, tion, ing, ment, ant, ent, ence, ance*, and *ency*. These endings often change verbs into nouns and adjectives, requiring you to add a verb to get your point across.
- **Clarify sentence structure.** Keep the subject and predicate of a sentence as close together as possible. Similarly, adjectives, adverbs, and prepositional phrases usually make the most sense when they're placed as close as possible to the words they modify.

Subject and predicate should be placed as close together as possible, as should modifiers and the words they modify.

- **Clarify awkward references.** Try to avoid vague references such as *the above-mentioned, as mentioned above, the aforementioned, the former, the latter*, and *respectively*. Use a specific pointer such as "as described in the second paragraph on page 14."

TABLE 6.2 Revising for Clarity

Issues to Review	Ineffective	Effective
Overly Long Sentences (taking compound sentences too far)	The magazine will be published January 1, and I'd better meet the deadline if I want my article included because we want the article to appear before the trade show.	The magazine will be published January 1. I'd better meet the deadline because we want the article to appear before the trade show.
Hedging Sentences (overqualifying sentences)	I believe that Mr. Johnson's employment record seems to show that he may be capable of handling the position.	Mr. Johnson's employment record shows that he is capable of handling the position.
Unparallel Sentences (using dissimilar construction for similar ideas)	Mr. Simms had been drenched with rain, bombarded with telephone calls, and his boss shouted at him.	Mr. Simms had been drenched with rain, bombarded with telephone calls, and shouted at by his boss.
	To waste time and missing deadlines are bad habits.	Wasting time and missing deadlines are bad habits.
Dangling Modifiers (placing modifiers close to the wrong nouns and verbs)	Walking to the office, a red sports car passed her. [suggests that the car was walking to the office]	A red sports car passed her while she was walking to the office.
	Reduced by 25 percent, Europe had its lowest semiconductor output in a decade. [suggests that Europe shrank by 25 percent]	Europe reduced semiconductor output by 25 percent, its lowest output in a decade.
Long Noun Sequences (stringing too many nouns together)	The window sash installation company will give us an estimate on Friday.	The company that installs window sashes will give us an estimate on Friday.
Camouflaged Verbs (changing verbs into nouns)	The manager undertook implementation of the rules.	The manager implemented the rules.
	Verification of the shipments occurs weekly.	We verify shipments weekly.
	reach a conclusion about	conclude
	give consideration to	consider
Subject-Predicate Separation (putting the predicate too far from the subject)	A 10% decline in market share, which resulted from quality problems and an aggressive sales campaign by Armitage, the market leader in the Northeast, was the major problem in 2019.	The major problem in 2019 was a 10% loss of market share, which resulted from quality problems and an aggressive sales campaign by Armitage, the market leader in the Northeast.
Modifier Separation (putting adjectives, adverbs, or prepositional phrases too far from the words they modify)	Our antique desk lends an air of strength and substance with thick legs and large drawers.	With its thick legs and large drawers, our antique desk lends an air of strength and substance.
Awkward References (linking ideas in ways that cause more work for the reader)	The Law Office and the Accounting Office distribute computer supplies for paralegals and accountants, respectively.	The Law Office distributes computer supplies for paralegals; the Accounting Office distributes them for accountants.

EDITING FOR CONCISENESS

Many of the changes you make to improve clarity also shorten your message by removing unnecessary words. The next step is to examine the text with the specific goal of reducing the number of words. Readers appreciate conciseness and are more likely to read your documents if you have a reputation for efficient writing. See Table 6.3 for examples of the following tips:

Make your documents tighter by removing unnecessary words, phrases, and sentences.

- **Delete unnecessary words and phrases.** To test whether a word or phrase is essential, try the sentence without it. If the meaning doesn't change, leave it out.
- **Replace long words and phrases.** Short words and phrases are generally more vivid and easier to read than long ones.
- **Eliminate redundancies.** In some word combinations, the words say the same thing. For instance, "visible to the eye" is redundant because *visible* is enough without further clarification; "to the eye" adds nothing.
- **Recast *It is/There are* starters.** If you start a sentence with an indefinite pronoun such as *it* or *there*, odds are the sentence could be shorter and more active. For instance, "We believe …" is a stronger opening than "It is believed that …" However, there are times when using *it is*/*there are* is the simplest and most direct way to start a sentence, so don't be afraid to use this construction if it works.

TABLE 6.3 Revising for Conciseness

Issues to Review	Less Effective	More Effective
Unnecessary Words and Phrases		
Using wordy phrases	for the sum of	for
	in the event that	if
	prior to the start of	before
	in the near future	soon
	at this point in time	now
	due to the fact that	because
	in view of the fact that	because
	until such time as	when
	with reference to	about
Using too many relative pronouns (such as *that* or *who*)	Cars that are sold after January will not have a six-month warranty.	Cars sold after January will not have a six-month warranty.
	Employees who are driving to work should park in the underground garage.	Employees driving to work should park in the underground garage. OR Employees should park in the underground garage.
Using too few relative pronouns	The project manager told the engineers last week the specifications were changed.	The project manager told the engineers last week that the specifications were changed. The project manager told the engineers that the specifications were changed last week.
Long Words and Phrases		
Using overly long words	During the preceding year, the company accelerated operations.	Last year the company sped up operations.
	The action was predicated on the assumption that the company was operating at a financial deficit.	The action was based on the belief that the company was losing money.
Using wordy phrases rather than infinitives	If you want success as a writer, you must work hard.	To succeed as a writer, you must work hard.
	He went to the library for the purpose of studying.	He went to the library to study.
	The employer increased salaries so that she could improve morale.	The employer increased salaries to improve morale.
Redundancies		
Repeating meanings	absolutely complete	complete
	basic fundamentals	fundamentals
	follows after	follows
	free and clear	free
	refer back	refer
	repeat again	repeat
	collect together	collect
	future plans	plans
	return back	return
	important essentials	essentials
	end result	result
	actual truth	truth
	final outcome	outcome
	uniquely unusual	unique
	surrounded on all sides	surrounded
Using double modifiers	modern, up-to-date equipment	modern equipment
***It Is* and *There Are* Starters**	It would be appreciated if you would sign the lease today.	Please sign the lease today.
Starting sentences with *It* or *There*	There are five employees in this division who were late to work today.	Five employees in this division were late to work today.

CHECKLIST Revising Business Messages

A. Evaluate content, organization, style, and tone.
- Make sure the information is accurate, relevant, and sufficient.
- Check that all necessary points appear in logical order.
- Verify that you present enough support to make the main idea convincing and compelling.
- Be sure the beginning and ending of the message are effective.
- Make sure you've achieved the right tone for the audience and the situation.

B. Review for readability.
- Consider using a readability index, but be sure to interpret the score carefully.
- Use a mix of short, medium, and long sentences.
- Keep paragraphs short.
- Use bulleted and numbered lists to emphasize key points.
- Make the document easy to skim with headings and subheadings.

C. Edit for clarity.
- Break up overly long sentences and rewrite hedging sentences.
- Impose parallelism to simplify reading.
- Correct dangling modifiers.
- Reword long noun sequences and replace camouflaged verbs.
- Clarify sentence structure and awkward references.

D. Edit for conciseness.
- Delete unnecessary words and phrases.
- Shorten long words and phrases.
- Eliminate redundancies.
- Consider rewriting sentences that start with *It is* or *There are*.

As you make all these improvements, concentrate on how each word contributes to an effective sentence and on how each sentence helps develop a coherent paragraph. For a reminder of the tasks involved in revision, see "Checklist: Revising Business Messages."

Producing Your Message

4 LEARNING OBJECTIVE
List four principles of effective design, and explain the role of major design elements in document readability.

Now it's time to put your hard work on display. The *production quality* of your message—the total effect of page or screen design, graphical elements, typography, and so on—plays an important role in its effectiveness. A polished, inviting design not only makes your material easier to read but also conveys a sense of professionalism and importance.[2]

DESIGNING FOR READABILITY

The production quality of your documents affects readability and audience perceptions.

Design affects readability in two important ways. First, if used carefully, design elements can improve the effectiveness of your message. In contrast, poor design decisions, such as using distracting background images behind text, pointless animations, or tiny typefaces, act as barriers to communication. Second, the visual design sends a nonverbal message to your readers, influencing their perceptions of the communication before they read a single word.

Effective design helps you establish the tone of your document and helps guide your readers through your message (see Figure 6.3). To achieve an effective design, pay careful attention to the following design elements:

For effective design, pay attention to
- Consistency
- Balance
- Restraint
- Detail

- **Consistency.** Throughout each message, be consistent in your use of margins, typeface, type size, spacing, color, lines, and position. Being consistent from message to message is beneficial as well, because it helps audiences recognize your documents and know what to expect.
- **Balance.** Balance is an important but sometimes subjective design issue. One document may have a formal, rigid design in which the various elements are placed in a grid pattern, whereas another may have a less formal design in which elements flow more freely across the page—and both could be in balance. Like

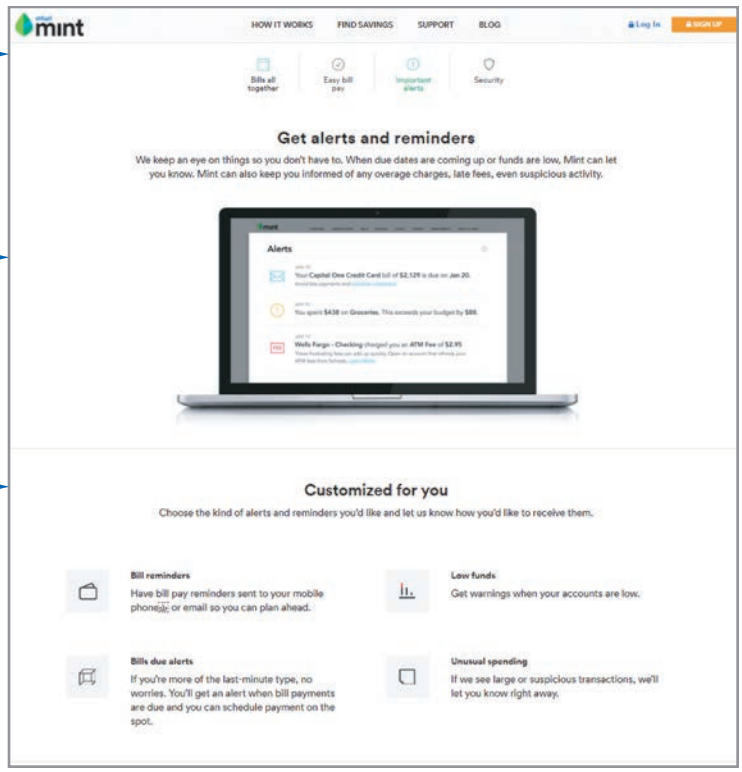


Figure 6.3 Readability in Digital Communication
This page from Mint's website demonstrates effective design choices for online readability.

the tone of your language, visual balance can be too formal, just right, or too informal for a given message.

- **Restraint.** Strive for simplicity. Don't clutter your message with too many design elements, too many colors, or too many decorative touches. Anything that doesn't support your message should be removed, if possible.
- **Detail.** Pay attention to all the details that affect readability. For instance, extremely wide columns of text can be difficult to read, so it may be better to split the text into two narrower columns.

Even without formal training in graphic design, you can make your printed messages more effective by understanding the use of some key design elements: white space, margins and line justification, typefaces, and type styles.

White Space

Any space that doesn't contain text or artwork, both in print and online, is considered **white space**. (Note that "white space" isn't necessarily white; it is simply blank.) These unused areas provide visual contrast and important resting points for your readers. White space includes margins, paragraph indents, space around images, the open area surrounding headings, vertical space between columns, and horizontal space between paragraphs or lines of text. These text-free zones make pages and screens appear less intimidating and therefore increase the chance that people will read them.

White space separates elements in a design and helps guide the reader's eye.

Margins and Justification

Margins define the space around text and between text columns. In addition to their width, the look and feel of margins is influenced by the way you arrange lines of text, which can be set (1) *justified* (which means they are *flush*, or aligned vertically, on both

MOBILE APP
Genius Scan lets you scan documents with your phone and create PDFs on the go.

Most business documents use a flush left margin and a ragged right margin.

the left and the right), (2) flush left with a *ragged right* margin, (3) flush right with a *ragged left* margin, or (4) centered. This paragraph is justified, whereas the paragraphs in Figure 6.2 on page 162 are flush left with a ragged right margin.

Magazines, newspapers, and books often use justified type because it can accommodate more text in a given space. However, justified type should be used with care. First, it creates a denser look because the uniform line lengths decrease the amount of white space along the right margin. Second, it produces a more formal and less personalized look. Third, unless it is used with some skill and attention, justified type can be more difficult to read because it can produce large gaps between words and excessive hyphenation at the ends of lines. The publishing specialists who create magazines, newspapers, and books have the time and skill needed to carefully adjust character and word spacing to eliminate these problems. (In some cases, sentences are even rewritten to improve the appearance of the printed page.) Because most business communicators don't have that time or skill, it's best to avoid justified type in routine business documents.

In contrast to justified type, flush-left, ragged-right type creates a more open appearance on the page, producing a less formal look. Spacing between words is consistent, and only long words that fall at the ends of lines are hyphenated.

Centered type is rarely used for text paragraphs but is commonly used for headings and subheadings. Flush-right, ragged-left type is rarely used in business documents.

Typefaces

Typeface refers to the visual design of letters, numbers, and other text characters; *typeface* and *font* are often used interchangeably, although strictly speaking they are different entities.

Typeface refers to the visual design of letters, numbers, and other text characters. As the Type Together vignette at the beginning of the chapter noted, *typeface* and *font* are often used interchangeably, but typeface is the design of the type itself, while a font is a collection of characters using that design.

Typeface design influences the tone of your message, making it look authoritative or friendly, businesslike or casual, classic or modern, and so on (see Table 6.4). Veronika Burian, José Scaglione, and other type designers know how to make design choices that evoke specific emotional reactions and trigger particular visual associations, so be sure to choose fonts that are appropriate for your message. (Note that many of the fonts on your computer are not appropriate for normal business use.)

Serif typefaces have small crosslines (called serifs) at the ends of each letter stroke; *sans serif typefaces* do not have these elements.

Serif typefaces have small crosslines (called serifs) at the ends of each letter stroke. **Sans serif typefaces**, in contrast, lack these serifs. For years, the conventional wisdom in typography was that serif faces were easier to read in long blocks of text because the serifs made it easier for the eye to pick out individual letters. Accordingly, the standard advice was to use serif faces for the body of a document and sans serif faces for headings and subheadings.

TABLE 6.4 Typeface Personalities: Serious to Casual to Playful

Serif Typefaces	Sans Serif Typefaces	Specialty Typefaces (rarely used for routine business communication)
Bookman Old Style	Arial	Bauhaus
Century Schoolbook	Calibri	Broadway
Courier	Eras Bold	Forte
Garamond	Franklin Gothic Book	Edwardian Script
Georgia	Gill Sans	Schuss Hand
Times New Roman	Verdana	STENCIL

However, the research behind the conventional wisdom is not as conclusive as once thought.[3] In fact, many sans serif typefaces work as well as or better than some serif typefaces for body text. This seems to be particularly true on screens, which sometimes have lower resolution than printed text. Many contemporary documents and webpages now use sans serif for body text.

The classic style of document design uses a sans serif typeface for headings and a serif typeface for regular paragraph text; however, many contemporary documents and webpages now use all sans serif.

To ensure a clean, uncluttered design, limit the number of typefaces in a document or webpage, and use them consistently throughout. For example, you can use one typeface for body text and another for headings and subheadings. If you have illustrations, sidebars, or other elements, you might use a third typeface to set them apart from the main text.

Type Styles

Type style refers to any modification that lends contrast or emphasis to type, including boldface, italic, underlining, color, and other highlighting and decorative styles. Using boldface type for subheads breaks up long expanses of text. You can also boldface individual words or phrases to draw more attention to them. For example, the key terms in each chapter in this book are set in bold. Italic type also creates emphasis, although not as pronounced as boldface. Italic type has specific uses as well, such as highlighting quotations and indicating foreign words, irony, humor, book and movie titles, and unconventional usage.

Type style refers to any modification that lends contrast or emphasis to type, including boldface, italic, underlining, color, and other highlighting and decorative styles.

As a general rule, avoid using any style in a way that slows your audience's progress through the message. For instance, underlining or using all-uppercase letters can interfere with a reader's ability to recognize the shapes of words, and shadowed or outlined type can seriously hinder legibility. Also, avoid overusing any type style. For example, putting too many words in boldface dilutes the impact of the special treatment by creating too many focal points in the paragraph.

Use type styles (boldface, italic, and underlining) sparingly to preserve their ability to emphasize key words and phrases.

Type size is an important consideration as well. For most printed business messages, use a size of 10 to 12 points for regular text and 12 to 18 points for headings and subheadings (1 point is approximately 1/72 inch). Resist the temptation to reduce type size too much to squeeze in extra text or to enlarge it to fill up space. Type that is too small is hard to read, whereas extra-large type looks unprofessional. Be particularly careful with small type online. It may look fine on a medium-resolution screen but can be hard to read on both low-resolution screens (because these displays can make letters look jagged or fuzzy) and high-resolution screens (because these monitors reduce the apparent size of the type even further).

Figures 6.4 and 6.5 on the next two pages illustrate some of the fundamental choices you need to make when designing and producing business documents.

FORMATTING FORMAL LETTERS AND MEMOS

Formal business letters usually follow certain design conventions, as the letter in Figure 6.2 illustrates. Most business letters are printed on *letterhead stationery*, which includes the company's name, address, and other contact information. The first element to appear after the letterhead is the date, followed by the inside address, which identifies the person receiving the letter. Next is the salutation, usually in the form of *Dear Mr.* or *Ms. Last Name*. The message comes next, followed by the complimentary close, usually *Sincerely* or *Cordially*. And last comes the signature block: space for the signature, followed by the sender's printed name and title. Your company will probably have a standard format to follow for letters, possibly along with a word-processor template. For in-depth information on letter formats, see Appendix A, "Format and Layout of Business Documents."

Refer to Appendix A for detailed guidance on formatting letters and memos.

Like letters, business memos usually follow a preset design. Memos have largely been replaced by digital media in many companies, but if they are still in use at the firm you join, the company may have a standard format or template for you to use. Most memos begin with a title such as *Memo*, *Memorandum*, or *Interoffice Correspondence*. Following that are usually four headings: *Date*, *To*, *From*, and *Subject*. (*Re:*, short for

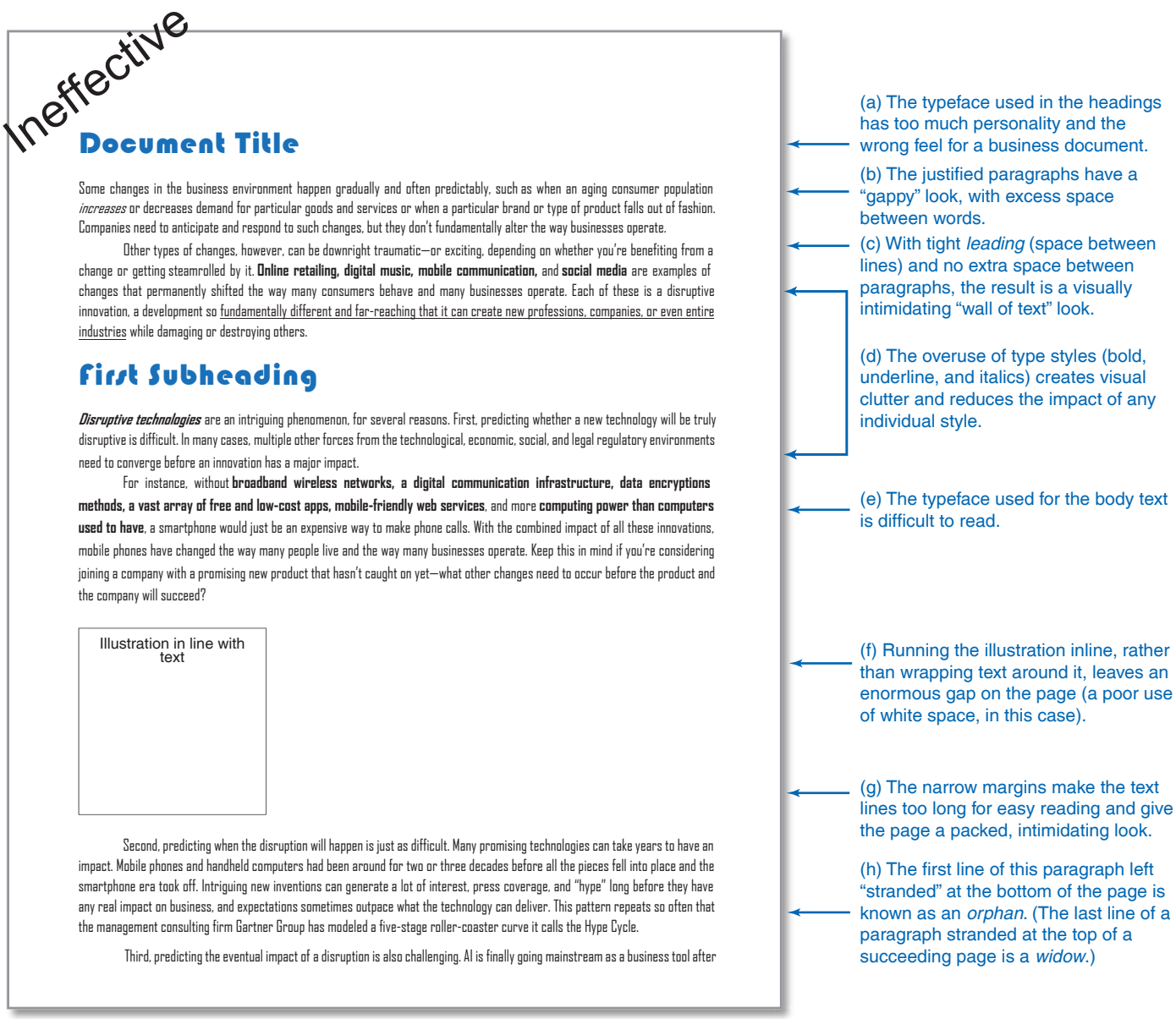


Figure 6.4 Ineffective Design Choices for Business Documents
The documents in Figures 6.4 and 6.5 illustrate some of the basic principles of effective document design (which apply to both printed and digital documents). Notice how with just a few simple changes, the ineffective version becomes much more inviting to read.

Regarding, is sometimes used instead of *Subject*.) Memos usually don't use a salutation, complimentary close, or signature, although signing your initials next to your name on the *From* line is standard practice in many companies. Bear in mind that memos are often distributed without sealed envelopes, so they are less private than most other message formats.

DESIGNING MESSAGES FOR MOBILE DEVICES

If your messages are likely to be read on mobile devices, think in small chunks of information and use lots of white space.

In addition to making your content mobile-friendly using the writing tips in Chapter 5 (see page 149), you can follow these steps to format that content for mobile devices:

- **Think in small chunks.** Remember that mobile users consume information one screen at a time, so try to divide your message into independent, easy-to-consume

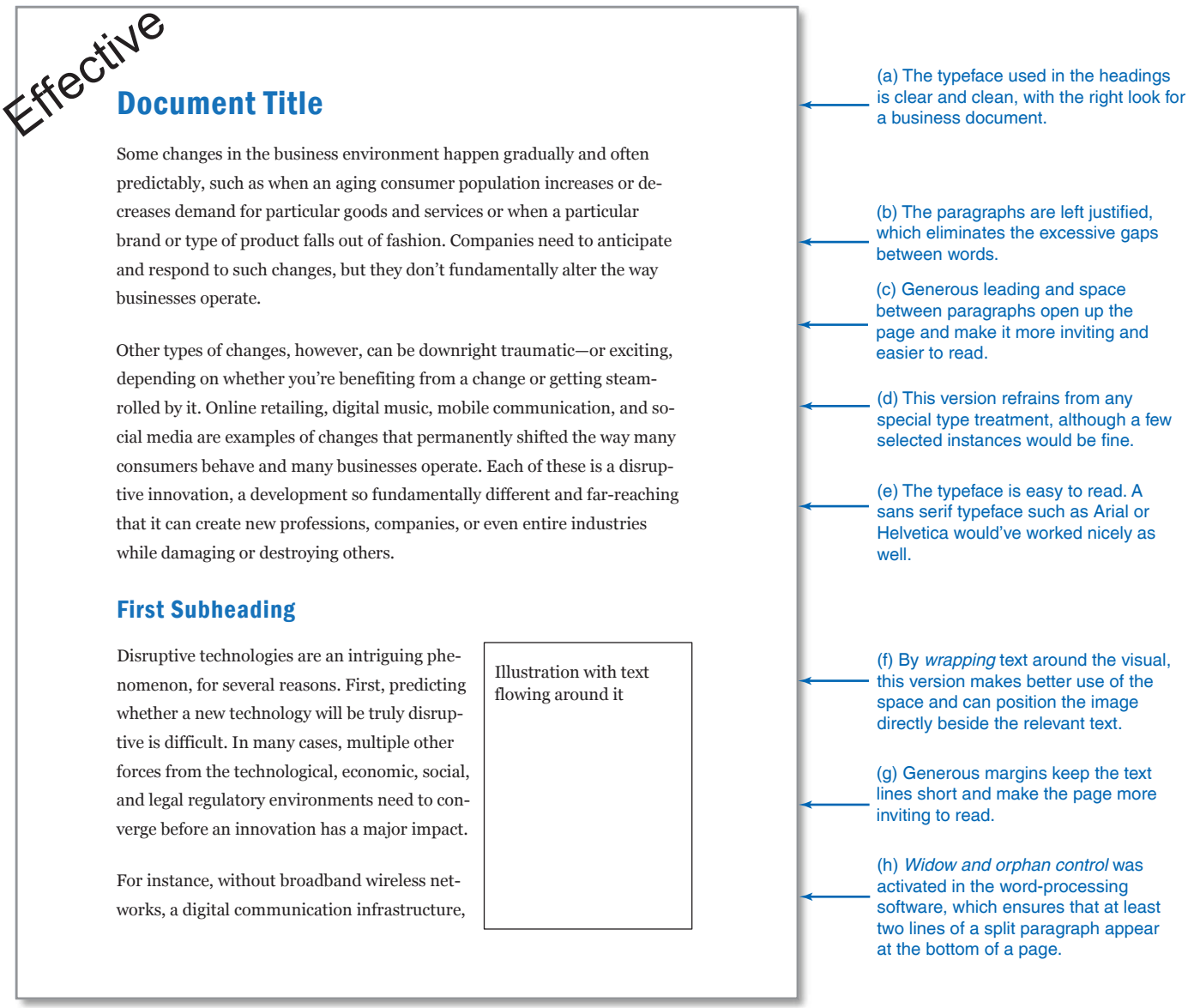
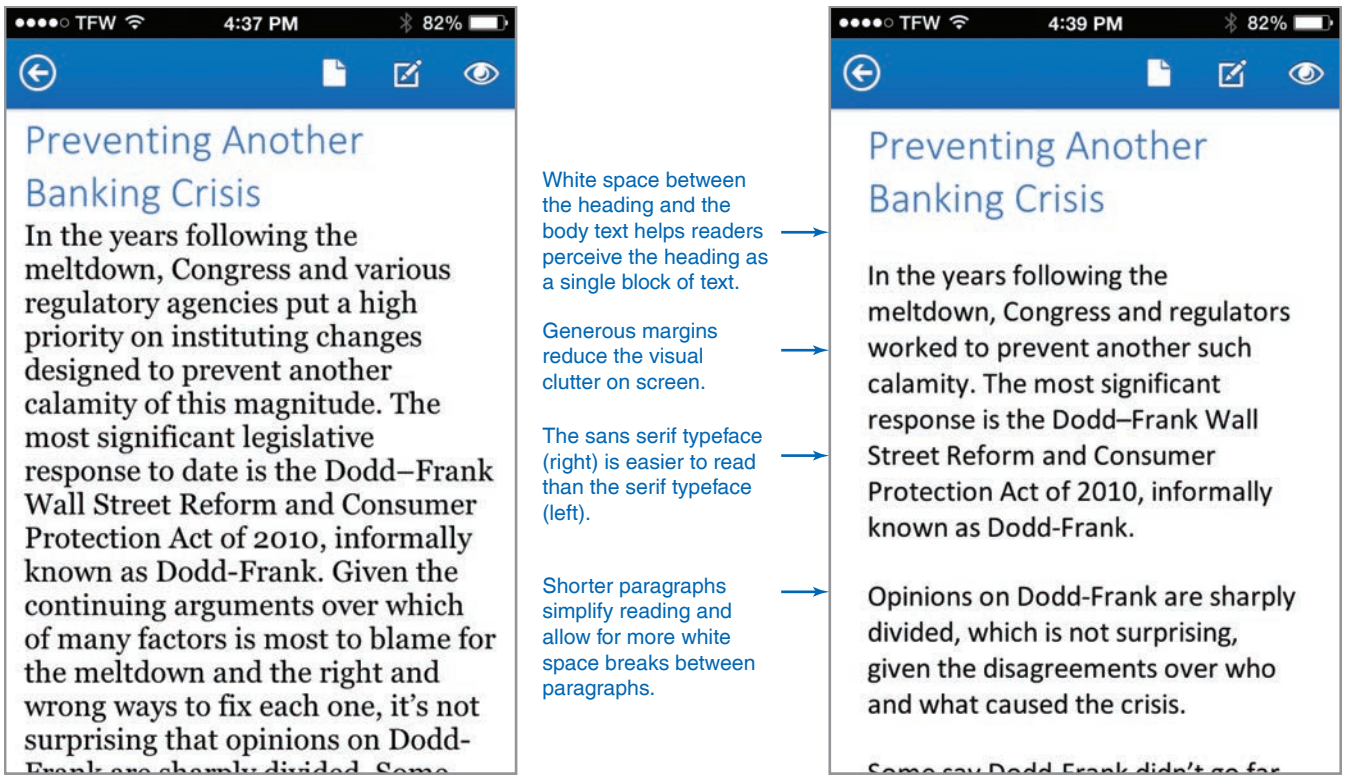


Figure 6.5 Effective Design Choices for Business Documents
Compare the version with Figure 6.4—notice how with just a few simple changes, the ineffective version becomes much more inviting to read. (Note that this open layout will require more pages, which could be a consideration if the document is meant to be printed.)

bites. If readers have to scroll through a dozen screens to piece together your message, they might miss key points or just give up entirely.

- **Make generous use of white space.** White space is always helpful, but it's critical on small screens because readers are trying to get the gist of every message as quickly as possible. Keep your paragraphs short (four to six lines) and separate them with blank lines so the reader's eyes can easily jump from one point to the next.[4]
- **Format simply.** Avoid anything that is likely to get in the way of fast, easy reading, including busy typefaces, complex graphics, and complicated layouts.
- **Consider horizontal and vertical layouts.** Most phones and tablets can automatically rotate their screen content from horizontal to vertical as the user rotates the device. A layout that doesn't work well with the narrow vertical perspective might be acceptable at the wider horizontal perspective.

MOBILE APP
Ginger Page offers a grammar checker, dictionary, thesaurus, translator, and other tools to help with mobile writing.



Courtesy of Android.

Figure 6.6a Figure 6.6b

Figure 6.6 Designing for Mobile Devices
Even simple changes, such as revising with shorter paragraphs, choosing cleaner typefaces, and making generous use of white space in and around the text, can dramatically improve readability on mobile screens.

Compare the two messages in Figure 6.6; notice how much more difficult the screen in Figure 6.6a is to read.

Proofreading Your Message

5 LEARNING OBJECTIVE
Explain the importance of proofreading, and give seven tips for successful proofreading.

Accuracy and attention to detail help build your credibility, so proofread messages and documents carefully.

Proofreading is the quality inspection stage for your documents, your last chance to make sure that your document is ready to carry your message—and your reputation—to the intended audience. Even a small mistake can doom your efforts, so take proofreading seriously.

Look for two types of problems: (1) undetected mistakes from the writing, design, and layout stages and (2) mistakes that crept in during production. For the first category, you can review format and layout guidelines in Appendix A on page 587 and brush up on writing basics with the Handbook of Grammar, Mechanics, and Usage on page 611. The second category can include anything from computer glitches such as missing fonts to broken web links to problems with the ink used in printing. Be particularly vigilant with complex documents and complex production processes that involve multiple colleagues and multiple computers. Strange things can happen as files move from computer to computer, especially when lots of fonts and multimedia elements are involved.

To be most effective, proofreading should be a methodical procedure in which you look for specific problems. Here is some advice from the pros:

- **Make multiple passes.** Go through the document several times, focusing on a different aspect each time. For instance, look for content errors the first time and layout errors the second time.
- **Use perceptual tricks.** To keep from missing errors that are "hiding in plain sight," try reading pages backward, placing your finger under each word and reading it silently, covering everything but the line you're currently reading, or reading the document aloud.

APPLY YOUR SKILLS NOW

Make QA Part of Your Communication Process

When manufacturers produce something, an essential step in the process is *quality assurance (QA),* a methodical evaluation of the product's quality relative to its design goals. This is the last chance before the product ships out to customers to make sure it is something the company can be proud of.

Make QA an essential part of your communication process, whether you're writing reports, crafting presentations, or completing any other type of assignment. By getting in the QA habit now, it will be second nature when you're writing and presenting on the job.

The steps presented in this chapter are a sure and simple method for effective QA. Follow the Checklist on page 170 and the one below on this page or the Five-Minute Guide at the end of the chapter. With each assignment, remember to give yourself enough time to evaluate your first draft, revise it to improve readability, edit it for clarity and conciseness, and then produce professional-quality output. Once you get in the habit, producing high-quality documents and presentations doesn't take much more time and energy than producing mediocre work, so take the extra step to put your best self on display.

COACH YOURSELF

1. Do you ever feel the temptation to say, "Eh, that's good enough" on an assignment when you know you could do better? What can you do to reset your priorities so that quality work is a matter of habit?
2. Do you need to examine your work methods to make sure you leave enough time to do an effective QA check on every assignment?

- **Focus on high-priority items.** Double-check names, titles, dates, addresses, and any number that could cause grief if incorrect.
- **Get some distance.** If possible, don't proofread immediately after finishing the document. Let your brain wander off to new topics and then come back fresh later.
- **Stay focused and vigilant.** Block out distractions and focus as completely as possible on your proofreading. Avoid reading large amounts of material in one sitting and try not to proofread when you're tired.
- **Review complex digital documents on paper.** Some people have trouble proofreading webpages, online reports, and other digital documents on-screen. If you have trouble, print the materials so you can review them on paper.
- **Take your time.** You're more likely to miss things if you rush.

The types of details to look for when proofreading include language errors, missing material, design errors, and typographical errors.

The amount of time you need to spend on proofing depends on the length and complexity of the document and the situation. A typo in an email message to your team may not be a big deal, but a typo in a financial report, a contract, or a medical file certainly could be serious. See "Checklist: Proofing Business Messages" for a handy list of items to review during proofing, and read "Apply Your Skills Now: Make QA Part of Your Communication Process."

CHECKLIST ✓ Proofing Business Messages

A. Look for writing errors.
- Typographical mistakes
- Misspelled words
- Grammatical errors
- Punctuation mistakes

B. Look for design and layout errors.
- Lack of adherence to company standards
- Page or screen layout errors (such as incorrect margins and column formatting)
- Awkward page breaks or line breaks
- Inconsistent font usage (such as with headings and subheadings)
- Alignment problems (columns, headers, footers, and graphics)
- Missing or incorrect page and section numbers
- Missing or incorrect page headers or footers
- Missing or incorrect URLs, email addresses, or other contact information
- Missing or incorrect photos and other graphical elements
- Missing or incorrect source notes, copyright notices, or other reference items

C. Look for production errors.
- Printing problems
- Browser compatibility problems
- Screen size or resolution issues for mobile devices
- Incorrect or missing tags on blog posts
- Missing files

Distributing Your Message

6 LEARNING OBJECTIVE
Discuss the most important issues to consider when distributing your messages.

Consider cost, convenience, time, security, and privacy when choosing a distribution method.

With the production finished, you're ready to distribute your message. As with every other aspect of business communication, your options for distribution multiply with every advance in technology. In some cases, the choice is obvious: Just click or tap the Send button in your email program or the Publish button on your blog. In other cases, such as when you have a 100-page report with full-color graphics or a massive multimedia file, you need to plan the distribution carefully so that your message is received by everyone who needs it. When choosing a means to distribute messages, consider the following factors:

- **Cost.** Cost isn't a concern for most messages, but for multiple copies of lengthy reports or multimedia productions, it may well be. Printing, binding, and delivering reports can be expensive, so weigh the cost versus the benefits. Be sure to consider the nonverbal message you send regarding cost as well. Overnight delivery of a printed report could seem responsive in one situation but wasteful in another, for example.
- **Convenience.** Make sure your audience can conveniently access and use the material you send. For instance, sending huge files may be fine on a fast office network, but receiving such files might be a major headache for remote colleagues trying to download them over home networks.
- **Time.** How soon does the message need to reach the audience? Don't waste money on overnight delivery if the recipient won't read a report for a week.
- **Security and privacy.** The convenience offered by digital communication needs to be weighed against security and privacy concerns. For the most sensitive messages, your company will probably restrict both the people who can receive the messages and the means you can use to distribute them. In addition, astute computer users are wary of opening attachments these days. Instead of sending word-processor files, you can use Adobe Acrobat or an equivalent product to convert your documents to PDF files, which are more immune to viruses. Some versions of popular word-processing programs also let you output files as PDFs.

MOBILE APP
DocuSign is one of many apps that solve the problem of signing digital documents such as contracts; you can sign right on your phone screen.

COMMUNICATION CHALLENGES AT Type Together

You've joined Type Together as a marketing communications specialist, and your responsibilities include writing new content as well as revising and editing content submissions from other people in the company. Use what you've learned in this chapter about revising and editing to address these two challenges.

INDIVIDUAL CHALLENGE: Type foundries such as Type Together can sell their wares through a variety of online stores, where graphic designers and other users can select from thousands of fonts. These sites typically include a short description of the foundry's history, design philosophy, product line, and other characteristics. Assume that a particular site has a 75-word limit for this description. Review the Info page on Type Together's website at www.type-together.com, including the About Us section and the biographies of José Scaglione and Veronika Burian. Identify three or four essential points that would be of interest to people shopping for fonts, then craft a compelling introductory paragraph of no more than 75 words.

TEAM CHALLENGE: As with many aspects of digital media, the tasks of selecting and using fonts were once the domain of trained specialists but are now within the reach of every computer user. In fact, users with no background in typography are often forced to make choices involving type, even if they would rather not do so. Not surprisingly, everyday computer users can make ill-informed choices that limit the effectiveness of their messages and documents. With a team assigned by your instructor, do the research needed to come up with a list of "dos and don'ts" for choosing and using the fonts available on a typical computer or tablet. Start with the information provided in this chapter, but review at least three other sources to expand your perspective. As your instructor directs, present your advice in class or in a post on your class blog. Assume your target audience is made up of business professionals with no training or experience in graphic design or typography.

Key Terms

descriptive headings Headings that simply identify a topic
heading A brief title that tells readers about the content of the section that follows
informative headings Headings that guide readers to think in a certain way about the topic
sans serif typefaces Typefaces whose letters lack serifs
serif typefaces Typefaces with small crosslines (called *serifs*) at the ends of letter strokes
subheadings Titles that are subordinate to headings, indicating subsections within a major section
type style Any modification that lends contrast or emphasis to type, including boldface, italic, underlining, color, and other highlighting and decorative styles
typeface The physical design of letters, numbers, and other text characters (*Font* and *typeface* are often used interchangeably, although strictly speaking, a font is a set of characters in a given typeface.)
white space Space (of any color) in a document or screen that doesn't contain any text or artwork

Summary of Learning Objectives

1 Discuss the value of careful revision, and describe the tasks involved in evaluating your first drafts and the work of other writers. Revision is a vital step in producing effective business messages; even if the first draft conveys the necessary information, chances are it can be made tighter, clearer, and more compelling—making it more successful. Careful revision also helps you locate and correct errors that can reduce the effectiveness of messages and damage your reputation as a communicator.

When evaluating your first drafts, check the *content* (is the content accurate, relevant, complete, and well balanced between general and specific information?); the *organization* (are your points grouped and sequenced logically, with focus on the most important ideas?); and the *tone* (is the tone appropriate for the audience and the specific situation?).

2 List four techniques you can use to improve the readability of your messages. Four techniques that help improve readability are varying sentence length, keeping paragraphs short, using lists, and adding headings and subheadings. Varying sentence length helps keep your writing fresh and dynamic while giving you a chance to emphasize the most important points. Paragraphs, on the other hand, are usually best kept short to make it easier for readers to consume your information in manageable chunks. Lists are effective devices for delineating sets of items, steps in a procedure, or other collections of related information. Headings and subheadings organize your message, call attention to important information, and help readers make connections between related pieces of information.

3 Describe eight steps you can take to improve the clarity of your writing, and give four tips on making your writing more concise. To clarify your writing, (1) break up overly long sentences, (2) rewrite hedging sentences, (3) impose parallelism, (4) correct dangling modifiers, (5) reword long noun sequences, (6) replace camouflaged verbs, (7) improve sentence structure, and (8) clarify awkward references. To make messages more concise, (1) delete unnecessary words and phrases, (2) shorten overly long words and phrases, (3) eliminate redundancies, and (4) recast sentences that begin with *It is* and *There are*.

4 List four principles of effective design, and explain the role of major design elements in document readability. Four important principles of effective design are *consistency* (using design elements in a consistent and predictable way throughout a document); *balance* (creating a balanced effect on page or screen, whether that balance is dynamic and informal or symmetrical and formal); *restraint* (striving for visual simplicity to avoid drawing attention away from your ideas); and *detail* (making sure that details are handled correctly so that errors or design misjudgments don't detract from your message).

The major design elements for textual messages include white space, margins, typefaces, and type styles. White space provides contrast and gives readers a resting point. Margins define the space around the text and contribute to the amount of white space. Margins can affect both readability and the overall visual appeal of your messages. Typefaces influence the tone of the message and should be chosen carefully for each use to ensure maximum readability. Type styles such as boldface, italic, and underlining provide contrast or emphasis.

5 Explain the importance of proofreading, and give seven tips for successful proofreading. Proofreading is essential because it is your final opportunity to verify the quality of your communication efforts and to make sure that no errors in writing, design, or production will undo all the hard work you've put in. Proofreading should be more than just a quick glance through the document. Use the techniques the pros use to make sure your documents are top quality: (1) Make multiple passes, looking for specific types of problems each time. (2) Use perceptual tricks such as reading aloud or reading backward to prevent your brain from fooling you by filling in pieces or correcting errors. (3) Double-check high-priority items such as names, dates, addresses, and financial data. (4) Give yourself some distance by putting the document aside for a few hours or even a few days if possible. (5) Stay vigilant by proofing only small sections at a time and not proofing when you are tired. Stay focused on your work. (6) Review complex digital documents on paper if possible. (7) Take your time.

6 Discuss the most important issues to consider when distributing your messages. Consider cost, convenience, time, security, and privacy when choosing the method to distribute your messages. Cost isn't a major issue for most messages, although production, printing, and distribution of lengthy or complex reports can be a concern. In general, balance the cost with the importance and urgency of the message. Make sure the distribution method is convenient for your audience. For example, attaching a document to an email message might be easy for you, but that might not be the best approach for a given audience. As with cost, balance the time factor with your needs and the needs of your audience. Finally, consider security and privacy issues before distributing documents that contain sensitive or confidential information. Your company may have restrictions on the type of information that can be distributed through various media and channels.

Test Your Knowledge

To review chapter content related to each question, refer to the indicated Learning Objective.

6-1. What are the three main tasks involved in revising a business message? [LO-1]
6-2. What are your two primary responsibilities when editing or revising the work of another writer? [LO-1]
6-3. What are the relative advantages of short, medium, and long sentences? [LO-2]
6-4. What functions do headings serve? [LO-2]
6-5. What are some ways you can make a document more concise? [LO-3]
6-6. What are hedging sentences, and why should they be avoided unless truly necessary? [LO-3]
6-7. What steps should you take to format content for mobile devices? [LO-4]
6-8. Why is proofreading an important part of the writing process? [LO-5]
6-9. What perceptual tricks can you use to improve your chances of spotting errors during proofreading? [LO-5]
6-10. What factors should you consider when choosing a distribution method for your messages (other than for systems where you don't have a choice)? [LO-6]

Apply Your Knowledge

To review chapter content related to each question, refer to the indicated Learning Objective.

6-11. How does careful revision reflect the "you" attitude? [LO-1]
6-12. Why is it helpful to put your first draft aside for a while before you begin the editing process? [LO-1]
6-13. Why should you limit the number of typefaces and type styles in most business documents? [LO-4]
6-14. How do your typeface selections help determine the personality of your documents and messages? [LO-4]
6-15. Why is white space particularly critical when designing documents for mobile devices? [LO-4]
6-16. How can you demonstrate good business sense in the choices you make regarding message distribution? [LO-6]

Practice Your Skills

Message for Analysis

6-17. **Revising to Improve Readability** [LO-2] Analyze the strengths and weaknesses of this message, and then revise it so that it follows the guidelines in Chapters 4 through 6:

> As an organization, the North American Personal Motorsports Marketing Association has committed ourselves to helping our members—a diverse group comprising of dealers of motorcycles, all-terrain vehicles, Snowmobiles, and personal watercraft—achieve their business objectives. Consequently, our organization, which usually goes under the initials NAPMMA, has the following aims, goals, and objectives. Firstly, we endeavor to aid or assist our members in reaching their business objectives. Second, NAPMMA communicates ("lobbying" in slang terms) with local, state, and national governmental agencies and leaders on issues of importance to our members. And lastly, we educate the motorsports public, that being current motorsports vehicle owners, and prospective owners of said vehicles, on the safe and enjoyable operation of they're vehicles.

Exercises

Each activity is labeled according to the primary skill or skills you will need to use. To review relevant chapter content, you can refer to the indicated Learning Objective. In some instances, supporting information will be found in another chapter, as indicated.

6-18. **Evaluating the Work of Other Writers** [LO-1] Find a blog post (at least three paragraphs long) on any business-related topic. Evaluate it using the 10 questions on page 163. Email your analysis to your instructor, along with a link to the post.
6-19. **Revising for Readability (Sentence and Paragraph Length)** [LO-2] Rewrite the following paragraph to vary the length of the sentences and to shorten the paragraph so it looks more inviting to readers:

> Although major league baseball remains popular, more people are attending minor league baseball games because they can spend less on admission, snacks, and parking and still enjoy the excitement of America's pastime. Connecticut, for example, has three AA minor league teams, including the New Haven Ravens, who are affiliated with the St. Louis Cardinals; the Norwich Navigators, who are affiliated with the New York Yankees; and the New Britain Rock Cats, who are affiliated with the Minnesota Twins. These teams play in relatively small stadiums, so fans are close enough to see and hear everything, from the swing of the bat connecting with the ball to the thud of the ball landing in the outfielder's glove. Best of all, the cost of a family outing to see rising stars play in a local minor league game is just a fraction of what the family would spend to attend a major league game in a much larger, more crowded stadium.

Revising for Readability (Sentence Length) [LO-2] Break the following sentences into shorter ones by adding more periods and revise as needed for smooth flow:

6-20. The next time you write something, check your average sentence length in a 100-word passage, and if your sentences average more than 16 to 20 words, see whether you can break up some of the sentences.
6-21. Unfortunately, no gadget will produce excellent writing, but using a yardstick like the Flesch Reading Ease score gives us some guideposts to follow for making writing easier to read because its two factors remind us to use short sentences and simple words.
6-22. Know the flexibility of the written word and its power to convey an idea, and know how to make your words behave so that your readers will understand.

6-23. Words mean different things to different people, and a word such as *block* may mean city block, butcher block, engine block, auction block, or several other things.

Editing for Conciseness (Unnecessary Words) [LO-3] Cross out unnecessary words in the following phrases:

6-24. Consensus of opinion
6-25. New innovations
6-26. Long period of time
6-27. At a price of $50
6-28. Still remains

Editing for Conciseness (Long Words) [LO-3] Revise the following sentences, using shorter, simpler words:

6-29. Our superannuated content management system has proven to be ineffectual once again.
6-30. It is imperative that the pay increments be terminated before an inordinate deficit is accumulated.
6-31. There was unanimity among the executives that his behavior was cause for a mandatory meeting with the company's personnel director.
6-32. The impending liquidation of the company's assets was cause for jubilation among the company's competitors.
6-33. The expectations of the president for a stock dividend were accentuated by the preponderance of evidence that the company was in good financial condition.

Editing for Conciseness (Lengthy Phrases) [LO-3] Use infinitives as substitutes for the overly long phrases in these sentences:

6-34. For living, I require money.
6-35. They did not find sufficient evidence for believing in the future.
6-36. Bringing about the destruction of a dream is tragic.

Editing for Conciseness (Lengthy Phrases) [LO-3] Rephrase the following in fewer words:

6-37. In the near future
6-38. In the event that
6-39. In order that
6-40. For the purpose of
6-41. With regard to
6-42. It may be that
6-43. In very few cases
6-44. With reference to
6-45. At the present time
6-46. There is no doubt that

Editing for Conciseness (Lengthy Phrases) [LO-3] Revise to condense these sentences to as few words as possible:

6-47. We are of the conviction that writing is important.
6-48. In all probability, we're likely to have a price increase.
6-49. Our goals include making a determination about that in the near future.
6-50. When all is said and done at the conclusion of this experiment, I'd like to summarize the final wrap-up.
6-51. After a trial period of three weeks, during which time she worked for a total of 15 full working days, we found her work was sufficiently satisfactory so that we offered her full-time work.

Editing for Conciseness (Unnecessary Modifiers) [LO-3] Remove all the unnecessary modifiers from these sentences:

6-52. Tremendously high pay increases were given to the extraordinarily skilled and extremely conscientious employees.
6-53. The union's proposals were highly inflationary, extremely demanding, and exceptionally bold.

Editing for Clarity (Hedging) [LO-3] Rewrite these sentences so that they no longer contain any hedging:

6-54. It would seem that someone apparently entered illegally.
6-55. It may be possible that sometime in the near future the situation is likely to improve.
6-56. Your report seems to suggest that we might be losing money.
6-57. I believe Yolanda apparently has somewhat greater influence over employees in the e-marketing department.
6-58. It seems as if this letter of resignation means you might be leaving us.

Editing for Clarity (Indefinite Starters) [LO-3] Rewrite these sentences to eliminate the indefinite starters:

6-59. There are several examples here to show that Elaine can't hold a position very long.
6-60. It would be greatly appreciated if every employee would make a generous contribution to Draymond Cook's retirement party.
6-61. It has been learned in Washington today from generally reliable sources that an important announcement will be made shortly by the White House.
6-62. There is a rule that states that we cannot work overtime without permission.
6-63. It would be great if you could work late for the next three Saturdays.

Editing for Clarity (Parallelism) [LO-3] Revise these sentences to present the ideas in parallel form:

6-64. Mr. Hill is expected to lecture three days a week, to counsel two days a week, and must write for publication in his spare time.
6-65. She knows not only accounting, but she also reads Latin.
6-66. Both applicants had families, college degrees, and were in their thirties, with considerable accounting experience but few social connections.
6-67. This book was exciting, well written, and held my interest.
6-68. Don is both a hard worker and he knows social media marketing.

Editing for Clarity (Awkward References) [LO-3] Revise the following sentences to delete the awkward references:

6-69. The vice president in charge of sales and the production manager are responsible for the keys to 34A and 35A, respectively.
6-70. The keys to 34A and 35A are in executive hands, with the former belonging to the vice president in charge of sales and the latter belonging to the production manager.
6-71. The keys to 34A and 35A have been given to the production manager, with the aforementioned keys being gold embossed.

6-72. A laser printer and an inkjet printer were delivered to John and Megan, respectively.

6-73. The walnut desk is more expensive than the oak desk, the former costing $300 more than the latter.

Editing for Clarity (Dangling Modifiers) [LO-3] Rewrite these sentences to clarify the dangling modifiers:

6-74. Full of trash and ripped-up newspapers, we left Dallas on an airplane that apparently hadn't been cleaned in days.

6-75. Lying on the shelf, Ruby found the operations manual.

6-76. With leaking plumbing and outdated wiring, I don't think we should buy that property.

6-77. Being cluttered and filthy, Sandy took the whole afternoon to clean up her desk.

6-78. After proofreading every word, the letter was ready to be signed.

Editing for Clarity (Noun Sequences) [LO-3] Rewrite the following sentences to eliminate the long strings of nouns:

6-79. The focus of the meeting was a discussion of the bank interest rate deregulation issue.

6-80. Following the government task force report recommendations, we will be revising our job applicant evaluation procedures.

6-81. The production department quality assurance program components include employee training, supplier cooperation, and computerized detection equipment.

6-82. The supermarket warehouse inventory reduction plan will be implemented next month.

6-83. The business school graduate placement program is one of the best in the country.

Editing for Clarity (Sentence Structure) [LO-3] Rearrange the following sentences to bring the subjects closer to their verbs:

6-84. Trudy, when she first saw the bull pawing the ground, ran.

6-85. It was Terri who, according to Ted, who is probably the worst offender in the office (Tom excepted), mailed the wrong order.

6-86. William Oberstreet, in his new book *Investment Capital Reconsidered*, writes of the many mistakes that bankers through the decades have made.

6-87. Judy Schimmel, after passing up several sensible investment opportunities, despite the warnings of her friends and family, invested her inheritance in a jojoba plantation.

6-88. The president of U-Stor-It, which was on the brink of bankruptcy after the warehouse fire, the worst tragedy in the history of the company, prepared a press announcement.

Editing for Clarity (Camouflaged Verbs) [LO-3] Rewrite each sentence so that the verbs are no longer camouflaged:

6-89. Adaptation to the new rules was performed easily by the employees.

6-90. The assessor will make a determination of the tax due.

6-91. Verification of the identity of the employees must be made daily.

6-92. The board of directors made a recommendation that Mr. Ronson be assigned to a new division.

6-93. The auditing procedure on the books was performed by the vice president.

6-94. Completing: Designing for Readability; Media Skills: Blogging [LO-4], Chapter 8 Compare the home pages of Bloomberg (**www.bloomberg.com**) and MarketWatch (**www.marketwatch.com**), two websites that cover financial markets. What are your first impressions of these two sites? How do their overall designs compare in terms of information delivery and overall user experience? Choose three pieces of information that a visitor to these sites would be likely to look for, such as a current stock price, news from international markets, and commentary from market experts. Which site makes it easier to find this information? Why? Present your analysis in a post for your class blog.

6-95. Communication Ethics: Making Ethical Choices; Media Skills: Blogging [LO-3], Chapter 8 The time and energy required for careful revision can often benefit you or your company directly, such as by increasing the probability that website visitors will buy your products. But what about situations in which the quality of your writing and revision work really doesn't stand to benefit you directly? For instance, assume that you are putting a notice on your website informing the local community about some upcoming construction to your manufacturing plant.

The work will disrupt traffic for nearly a year and generate a significant amount of noise and air pollution, but knowing the specific dates and times of various construction activities will allow people to adjust their commutes and other activities to minimize the negative impact on their daily lives. However, your company does not sell products in the local area, so the people affected are not potential customers. Moreover, providing accurate information to the surrounding community and updating it as the project progresses will take time away from your other job responsibilities. Do you have an ethical obligation to keep the local community informed with accurate, up-to-date information? Why or why not?

6-96. Proofreading [LO-5] Proofread the following email message, and revise it to correct any problems you find:

Our final company orrientation of the year will be held on Dec. 20. In preparation for this sesssion, please order 20 copies of the Policy handbook, the confindentiality agreenemt, the employee benefits Manual, please let me know if you anticipate any delays in obtaining these materials.

Expand Your Skills

Critique the Professionals

Identify a company website that in your opinion violates one or more of the principles of good design discussed on pages 170–175. Using whatever medium your instructor requests, write a brief analysis of the site (no more than one page), citing specific elements from the piece and support from the chapter.

Sharpening Your Career Skills Online

Find a website, video, article, podcast, or presentation that offers advice on effective proofreading. Write a brief email message to your instructor, describing the item you found and summarizing the career skills information you learned from it.

Build Your Career

In Chapter 5's Build Your Career activity, you built the first layer of your brand pyramid, the *private inventory* of skills, attributes, experience, and areas for improvement. Now it's time to build the second layer, your *public profile*—the information about yourself that you might want to share in various public venues.

Start by identifying all the elements of your private inventory that you want to share with the public. This will involve your education, your technical skills, your soft skills such as leadership and teamwork, your work history, and any other skills, experiences, and attributes that present you in a positive light. Make sure you can support all the key points you make about your experience and qualifications.

Next, start brainstorming all the ways you can use this information. You will find that your profile can be expressed in a variety of ways, including a conventional résumé, your LinkedIn profile, and the profile statements on Twitter, Facebook, and other social media platforms. With all the information in hand, you'll find it easier to adapt the content to each use. As you move into your career, you will need to "summarize yourself" in various ways, such as providing conference organizers with a brief biographical sketch so they can introduce you as a speaker. You may find it helpful to write summaries of various lengths, such as 25, 50, and 100 words, and have them ready to use whenever the need arises.

In Chapter 7's Build Your Career activity, you'll complete the personal branding exercise by distilling your profile information down to a single *headline* statement.

Five-Minute Guide to Revising and Proofreading

Before you sit down to revise or proofread the draft of a document, review these helpful tips, and then keep this guide at your side while you revise, edit, and proofread.

00:01

Evaluate your first draft

1. Is the information accurate, relevant, and complete?
2. Is there a good balance between general information and specific information?
3. Are all the points covered in the most logical order?
4. Do the most important ideas receive the most coverage?
5. Would the message be more convincing if it were arranged in a different sequence?
6. Are any points repeated unnecessarily?
7. Are details grouped together logically?

00:02

Revise to improve readability

1. Vary the length of your sentences to maintain reader interest.
   - Short sentences can be processed quickly, but too many of them make writing choppy.
   - Medium-length sentences are useful for showing the relationships among ideas.
   - Long sentences are often the best for conveying complex ideas, but they can be more difficult to read and understand.
2. Keep your paragraphs as short as possible, under 100 words where you can.
3. Use numbered and bulleted lists to clarify and emphasize.
4. Add headings and subheadings to guide readers.

00:03

Edit for clarity

1. Break up overly long sentences.
2. Rewrite hedging sentences.
3. Impose parallelism.
4. Correct dangling modifiers.
5. Reword long noun sequences.
6. Replace camouflaged verbs.
7. Clarify sentence structure—keep subject and predicate as close to each other as possible, and keep modifiers close to the terms they modify.
8. Clarify awkward references.

00:04

Edit for conciseness

1. Delete unnecessary words and phrases.
2. Replace long words and phrases.
3. Eliminate redundancies.
4. Consider recasting *It is*/*There are* starters.

00:05

Proofread for quality

1. Look for undetected mistakes from the writing, design, and layout stages.
2. Look for mistakes that crept in during production.

Endnotes

1. Type Together website, accessed 26 March 2019, www.type-together.com; "Georgia Font Family," accessed 26 March 2019, www.microsoft.com; "Women in Design: Veronika Burian," Fontshop, 9 March 2015, www.fontshop.com; Jan Middendorp, "Creative Characters: Veronika Burian," MyFonts, October 2008, www.myfonts.com.
2. Deborah Gunn, "Looking Good on Paper," *Office Pro,* March 2004, 10–11.
3. Kas Thomas, "The Serif Readability Myth," assertTrue blog, 18 January 2013, asserttrue.blogspot.com; Ole Lund, "Knowledge Construction in Typography: The Case of Legibility Research and the Legibility of Sans Serif Typefaces," doctoral dissertation, University of Reading, October 1999.
4. "Mobile Message Mayhem," Verne Ordman & Associates, accessed 12 March 2014, www.businesswriting.biz.

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PART 3

Digital, Social, and Visual Media

CHAPTER 7 Digital Media

CHAPTER 8 Social Media

CHAPTER 9 Visual Media

Choosing the best medium for every business message and using it effectively are essential communication skills. Fortunately, you probably have a fair amount of experience with various digital, social, and visual media. The three chapters in this part will help you adapt that experience to the unique demands of business communication.



Tassii/E+/Getty Images

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7 Digital Media

LEARNING OBJECTIVES

After studying this chapter, you will be able to

1. Identify the major digital media formats available for business messages, and list nine compositional modes used in digital media.
2. Explain how to adapt the three-step writing process to email messages, and describe the importance of email subject lines.
3. Identify the major types of business messaging, and list guidelines for effective messaging in the workplace.
4. Explain why organizing website content is so challenging, and explain the concept of information architecture.
5. Explain how to adapt the three-step writing process to podcasting.



Mike Blake/Files/Reuters

Slack cofounder and CEO Stewart Butterfield guides the development of a workplace messaging system that thousands of companies are using to improve team communication.

COMMUNICATION CLOSE-UP AT Slack

slack.com

If there's a business award for accidental success, Stewart Butterfield would surely be a leading contender for it. He has the unusual distinction of being the cofounder of two separate video game companies that didn't succeed at their original missions but wound up spinning off secondary software features that became massive business successes on their own.

The first turned into the photo-sharing web service Flickr, which was once just a feature inside an online role-playing game. After selling Flickr to Yahoo! for a tidy sum, Butterfield cofounded a second video game company. Again, the game business didn't work out, but he and his partners commercialized an instant messaging function the company had developed for internal use. That capability was expanded and became the Slack workgroup messaging system, which is leading an upheaval in the world of business communication.

Slack offers several communication and collaboration tools, but at its heart it is a group messaging system. Teams can set up a variety of channels to manage communication on specific topics, and individuals can configure alerts to make sure they get the messages they need without being flooded with messages they don't, as often happens with email. (Users can set up private, invitation-only channels for confidential topics.) Two companies can also set up shared channels so that employees who work closely with external business partners join each other's conversations.

All communication is automatically archived, so it's easy for everyone on a team to find information. A key feature of Slack is transparency, in that most communication threads are no longer buried in email exchanges but are out in the open for everyone on a team to see and share.

To understand the appeal of Slack, one needs to understand the love/hate relationship many business professionals have with email. Email is so ubiquitous that it's easy to forget what a revolutionary and disruptive medium it once was. In a world where internal memos could take hours to deliver and external letters could take days, nearly instantaneous email changed business communication forever, and it remains a vital communication tool.

However, email has long suffered from a serious case of too-much-of-a-good-thing. Many professionals complain of drowning in a flood of email, with some getting dozens or hundreds of messages a day—even as they miss vital information when colleagues neglect to include them in message

threads. Moreover, email is poorly suited to some of the tasks people use it for, such as project management, collaboration, information management, and other processes that require group communication and shared information access.

A variety of technologies that aim to overcome the disadvantages of email have recently entered the market, from basic instant messaging to full-featured collaboration systems. But few have caught on as quickly as Slack, which claimed the title of fastest-growing business software in history soon after its launch. The service now has millions of active users.

For many business communicators, Slack is clearly filling an unmet need. A majority of customers report greater productivity, more transparency, improved team culture, easier access to information, and a reduced need for meetings. On average, users say it has cut email use in their organizations almost in half, and many say it has nearly eliminated email entirely. Some describe it as being more than a mere communication tool and in fact see it as a radical way to transform how they work.

Of course, like any tool, Slack and other messaging systems are vulnerable to misuse. Channels can fill up with gossip and personal chatter, and people can subscribe to channels they don't really need to follow. Frequent message alerts can be a distraction if users configure their accounts to be notified every time a new message is posted, but users sometimes fear they are falling out of the loop if they don't pay constant attention to message streams.

These potential downsides are common to most digital media, though, and it's up to individuals to use their tools wisely. To help people focus on the most important messages, Slack applies artificial intelligence techniques to suggest which waiting messages will be most valuable to them. Managers can also help by offering training in productive use of messaging tools. Slack and other corporate messaging systems have the capacity to help employees communicate and collaborate more effectively than email, but company leaders need to make sure they aren't replacing one set of problems with another.[1]

Digital Media for Business Communication

1 LEARNING OBJECTIVE

Identify the major digital media formats available for business messages, and list nine compositional modes used in digital media.

The success of Slack (profiled in the chapter-opening Communication Close-Up) highlights two important considerations in using digital media: choosing the best tools for the task at hand and using each tool wisely. This chapter offers advice on using several common tools you're likely to encounter in any profession: email, business messaging, websites, and podcasting. (Digital media with a distinctly social component are covered in Chapter 8.)

DIGITAL AND SOCIAL MEDIA OPTIONS

The range of options for short business messages continues to grow with innovations in digital and social media.

Professionals have a wide range of digital channel choices—so many, in fact, that choosing the right channel for each message has become a skill in itself:

- **Email.** Conventional email has long been a vital medium for business communication, although in many instances it is being replaced by other tools that provide better support for instant communication and real-time collaboration.
- **Business messaging.** From basic text messaging on mobile devices to multifunction workplace systems such as those offered by Slack, messaging in various forms now rivals or exceeds email in many companies.
- **Web content.** Websites are one of the most important digital media types, from small-business sites with a few pages to large corporate sites with hundreds or thousands of pages.
- **Podcasting.** Businesses use podcasts to replace or supplement some conference calls, newsletters, training courses, and other communication activities.
- **Social platforms.** Social networks and other systems with strong social elements have evolved into a major business communication technology.
- **Wikis.** The collaborative nature of wikis—websites that can be expanded and edited by teams, user communities, or the public at large—make them a natural fit for aggregating the knowledge of groups ranging from individual departments to the public at large.
- **Blogging and microblogging.** The ability to update content quickly and easily makes blogs and microblogs (such as Twitter) a natural medium when communicators want to get messages out in a hurry.

- **Online video.** Digital and online video have transformed what used to be a specialized tool into a mainstream business communication medium. Online video, along with other visual media, is covered in Chapter 9.

As this list suggests, businesses use many of the same tools you use for personal communication, so you will likely be familiar with the basic concepts. However, you will need to adapt to business expectations regarding writing style, privacy, and security.

Note that the lines between these media often get blurred as systems expand their capabilities or people use them in new ways. Moreover, the mobile variants of all these technologies add another layer of challenges and opportunities for business communicators. For example, the ability to scan coded labels such as barcodes or the similar *Quick Response (QR)* codes attached to printed materials, products, or store windows gives smartphone users a way to get more information instantly.

Even with the widespread use of digital media, printed memos and letters still play an important role in business communication.

Most of your business communication is likely to be via digital means, but don't overlook the benefits of printed messages. (For more on formatting printed letters and memos, see Chapter 6 and Appendix A.) Here are several situations in which you should consider using a printed message rather than digital alternatives:

- **When you want to make a formal impression.** For special messages, such as sending congratulations or condolences, the formality of printed documents usually makes them a much better choice than digital messages.
- **When you are legally required to provide information in printed form.** Business contracts and government regulations sometimes require that information be provided on paper.
- **When you want to stand out from the flood of digital messages.** Sometimes a printed message can stand out enough to get noticed.
- **When you need a permanent, unchangeable, or secure record.** Letters and memos are reliable. Once printed, they can't be erased with a single keystroke or surreptitiously modified the way some digital messages can be. Printed documents also require more effort to copy and forward.

COMPOSITIONAL MODES FOR DIGITAL AND SOCIAL MEDIA

Communicating successfully with digital media requires a wide range of writing approaches.

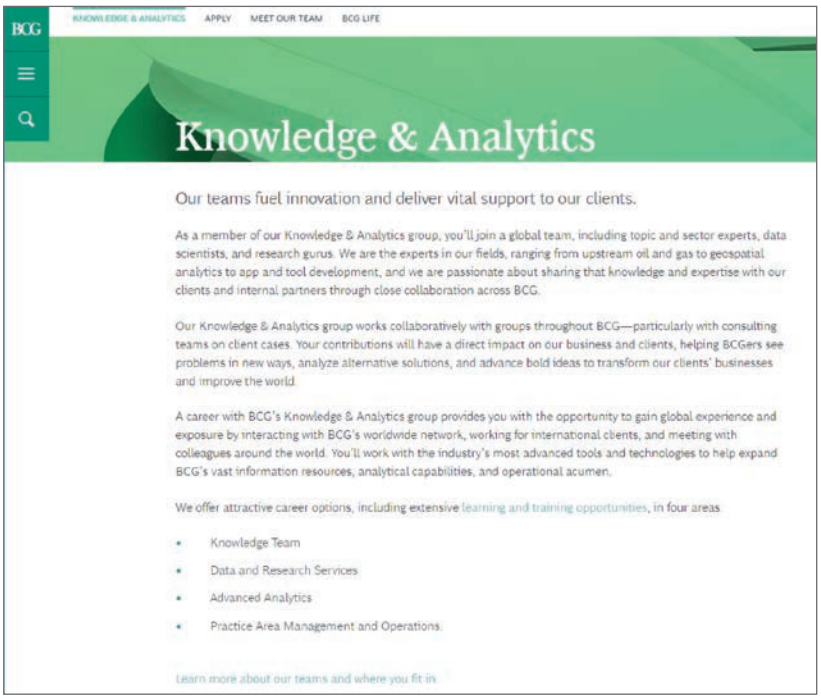
As you practice using various media and channels in this course, it's best to focus on the fundamentals of planning, writing, and completing messages, rather than on the specific details of any one medium or system.[2] Fortunately, the basic communication skills required usually transfer from one system to another. You can succeed with written communication in virtually all digital media by using one or more of nine *compositional modes*:

- **Conversations.** Although they take place via writing, some forms of digital communication function more like real-time conversations than the sharing of written documents. "Business Messaging," starting on page 200, explores this important and growing communication format.
- **Comments and critiques.** One of the most powerful aspects of social media is the opportunity for interested parties to express opinions and provide feedback, whether it's leaving comments on a blog post or reviewing products on an e-commerce site. Sharing helpful tips and insightful commentary is also a great way to build your personal brand. To be an effective commenter, focus on short chunks of information that a broad spectrum of other site visitors will find helpful. And even if you are offering criticism, keep it constructive. Angry rants and insults won't help anyone, and they brand you as unprofessional.

Comments and critiques can be a valuable way to contribute to social conversations.

- **Orientations.** The ability to help people find their way through an unfamiliar system or subject is a valuable writing skill and a talent that readers greatly appreciate. Unlike summaries (see the next item), orientations don't give away the key points in the collection of information but rather tell readers where to find those points. Writing effective orientations can be a delicate balancing act because you need to know the material well enough to guide others through it while being able to step back and view it from the inexperienced perspective of a "newbie."

Orientations don't give away the key points in the collection of information but rather tell readers where to find those points



Courtesy of Boston Consulting Group (BCG)

Figure 7.1 Compositional Modes: Summaries
This page from the careers section of the Boston Consulting Group (BCG) website is a good example of writing a summary. The three paragraphs and the bullet list combine to give potential employees a clear idea of what working in this part of the company is like; then candidates who want more information can follow the links to get more details.

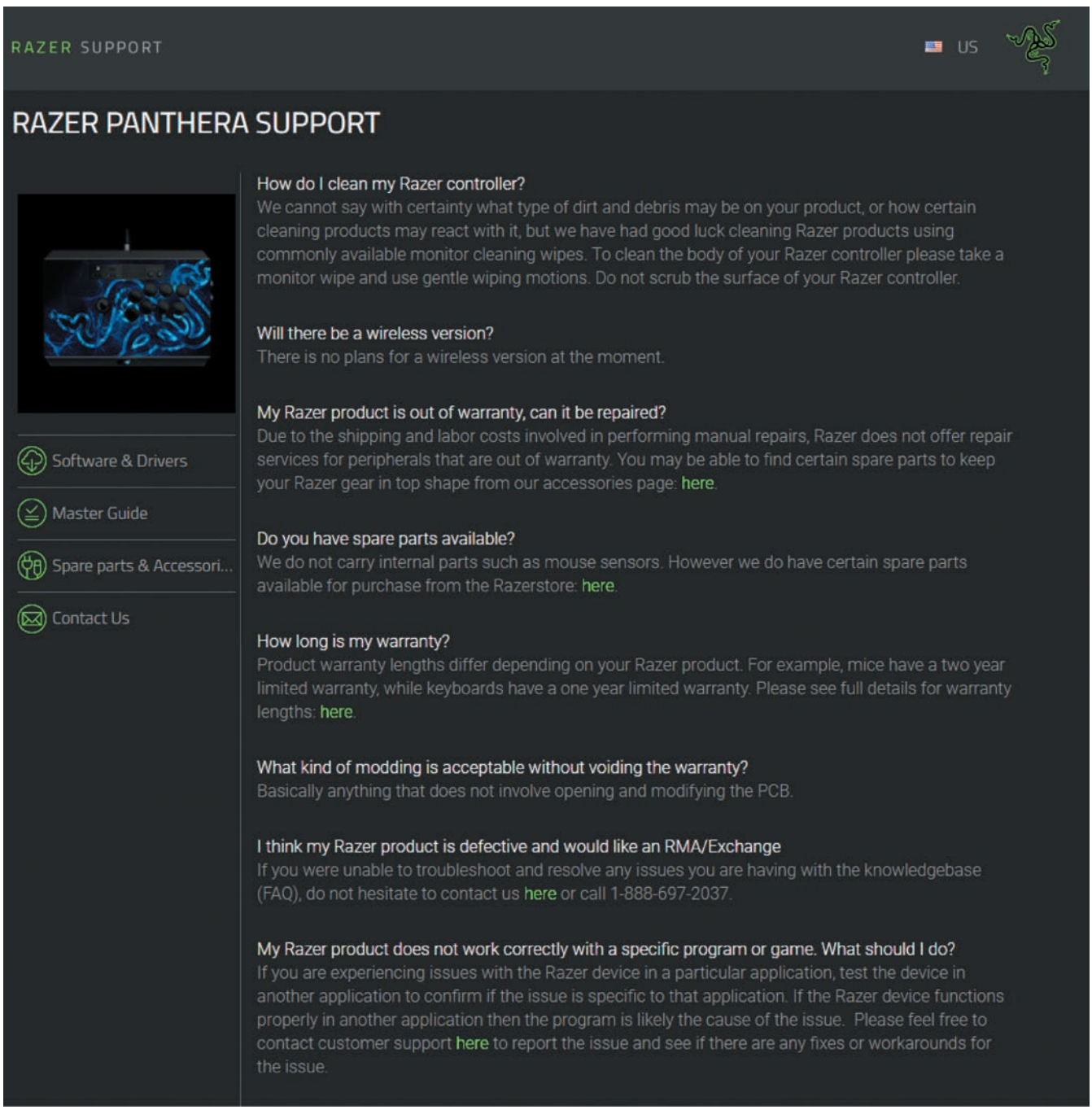
- **Summaries.** At the beginning of an article or webpage, a summary functions as a miniature version of the document, giving readers all the key points while skipping over details (see Figure 7.1). At the end of an article or webpage, a summary functions as a review, reminding readers of the key points they've just read.
- **Reference material.** One of the greatest benefits of the internet is the access it can provide to vast quantities of reference materials—numerical or textual information that people typically don't read in a linear way but rather search through to find data points, trends, or other details. One of the challenges of writing reference material is that you can't always know how readers will want to access it, so consider an orientation and organize the material in logical ways with clear headings that promote skimming.
- **Narratives.** The storytelling techniques covered in Chapter 4 can be effective in a wide variety of situations.
- **Teasers.** Teasers intentionally withhold key pieces of information to pull readers or listeners into a story or other document. Teasers are widely used in marketing and sales messages, such as a bit of copy on the outside of an envelope that promises important information on the inside. In digital media, the space limitations and URL linking capabilities of Twitter and other microblogging systems make them a natural tool for the teaser approach. Although they can certainly be effective, teasers need to be used with respect for readers' time and information needs. Be sure that the *payoff*, the information a teaser links to, is valuable and legitimate. (*Tweetables* are Twitter-ready bites of information extracted from a blog post or other messages. They often serve as teasers, although a series of them can make an effective summary as well.)

With Twitter and other super-short messaging systems, the ability to write a compelling teaser is a valuable skill.

- **Status updates and announcements.** Depending on the nature of the business you're in, status updates and announcements can be a great way to keep your followers up to date and to promote yourself or your company and its products. For example, if you become an industry expert, you can announce your upcoming speaking engagements on social media. However, be mindful of pushing too hard with self-promotion. Fans and product enthusiasts are naturally curious about what you're up to, but if your social channels begin to sound like 24-hour advertising, you might lose followers.

- **Tutorials and FAQs.** Given the community nature of social media, the purpose of many messages is to share how-to advice, from in-depth tutorials to answers to *frequently asked questions (FAQs)*, a common feature on websites (see Figure 7.2). Well-written tutorials and FAQs can increase customer satisfaction and reduce customer support costs, so mastering them is a valuable skill to develop. Becoming known as a reliable expert is also a great way to build customer loyalty for your company while enhancing your own personal brand.

Writing tutorials and answering frequently asked questions (FAQs) is a great way to assist stakeholders and build your reputation as an expert.



A trademark of Razer Inc. Used under license.

Figure 7.2 Compositional Modes: Tutorials and FAQs
Tutorials and frequently asked questions (FAQs) are common writing requirements in digital channels. Razer, a maker of high-performance computers, keyboards, and other products for gamers, offers concise answers to a variety of questions on this product support page, along with links to more extensive information where applicable.

THE EMOJI QUESTION—OVERCOMING THE LIMITATIONS OF LEAN MEDIA

You know this situation well: You're about to send a message via email or some form of text-based communication, but you're worried that the right tone won't come across. What if you're trying to be humorously sarcastic, but the recipient thinks you're being serious? Or what if you are trying to be friendly and sympathetic, but the words come across as cold and uncaring?

Expressing emotion and nuance without nonverbal cues is a challenge with many forms of digital media.

If you were communicating in person or on the phone, you could modulate the emotional tone of your message with various nonverbal cues, such as smiling, accenting certain words or syllables, shrugging your shoulders, and so on. However, when you are communicating in writing via email, text messaging, or any other lean medium (see page 111 for a refresher on the four dimensions of media richness), you don't have the luxury of these nonverbal cues—the words on screen must convey everything.

The Rise of Emojis

Emoticons (text-based symbols) and emojis (graphical symbols) help writers overcome the limitations of lean digital media.

The limitations of lean text-based communication gave rise to the use of emoticons and emojis to convey emotional tone in a way that can be difficult to do with words. (Opinions vary on the exact difference between the two, but for simplicity's sake, you can think of *emoticons* as symbols made up of text characters, such as :-), and *emojis* as graphical icons, such as ☺.) Using emoticons and emojis can be an effective way to minimize the limitations of a lean medium, which is why so many people now use them for personal and business communication. A smiley face can inject a touch of levity into a tense situation, a frowny face can convey sympathy for someone who has suffered a setback, and clapping hands can say "job well done!"

To Emoji or Not: Two Dilemmas

Emoticons and emojis present two dilemmas for business communicators: Their use is seen as unprofessional by some people, and their meanings can be misinterpreted.

As useful as these visual elements can be, they present two dilemmas for business communicators. First, even though more businesspeople are comfortable with emoticons and emojis for workplace communication, and they are built into many business communication systems (including Slack), some professionals view them as inappropriate for all but the most casual communication between close colleagues.[3]

Second, emoticons and emojis can cause problems of their own when people don't agree on what they mean. If you get a message that says, "Why don't you and I get away from this stress-fest and brainstorm some solutions over coffee" and ends with a "winkie" emoticon or emoji, what does that digital wink mean? Is the person flirting with you or just innocently suggesting that the two of you could think more clearly if you got out of the hectic office for a while? The meanings of emoticons and emojis are so problematic that they are becoming important factors in legal trials regarding workplace harassment and other issues, and serious criminal cases can hinge on their interpretation.[4]

Using Emoticons and Emojis Effectively

Given the fluid state of emoticon and emoji acceptance in business communication, there are few hard-and-fast rules. However, follow these tips to make the best use of them while avoiding trouble:

Know your audience before using emoticons and emojis.

- As in every aspect of business communication, know your audience and the situation. Study the tone of communication in your organization before deciding when and how to use emojis.
- Don't overuse emoticons or emojis. A message cluttered with symbols will look unprofessional, even in an organization that uses emojis regularly.
- Follow the lead of the person with greater positional power. For example, if an upper manager doesn't use emojis, don't use them when communicating back.

- Bear in mind that the use of emojis itself sends a message. If you are a new manager and your staff seems unsure how to behave around you, or you've been leading people through a tense experience, using emojis can send a signal that it's okay to relax and be themselves.[5]
- Avoid emoticons or emojis in communication with external audiences unless you have an established working relationship with a customer or other party.
- Never use emoticons or emojis in the most formal communication, including business plans, sales proposals, and contracts.
- To avoid misunderstandings about what emojis mean, stick to symbols that are in common use in your organization.
- Avoid crude or animated emojis.

Avoid emoticons and emojis when communicating with customers (unless you have a working relationship already) and in all formal communication.

Email

2 LEARNING OBJECTIVE
Explain how to adapt the three-step writing process to email messages, and describe the importance of email subject lines.

Email has been an important business communication tool for several decades, and in the beginning it offered a huge advantage in speed and efficiency over the media it usually replaced (printed and faxed messages). Over the years, email began to be used for many communication tasks simply because it was the only widely available digital format for written messages and millions of users were comfortable with it. For example, email is not usually the best choice for conversational communication (messaging systems such as Slack are usually better) or project management discussions and updates (blogs, wikis, and various purpose-built systems are often preferable).

Email remains a primary format for companies, but better alternatives now exist for many types of communication.

In addition to the widespread availability of better alternatives for many communication purposes, the indiscriminate use of email has lowered its appeal in the eyes of many professionals. In a sense, email is too easy to use—with a couple of clicks you can send low-value messages to multiple recipients or trigger long message chains that become difficult to follow as people chime in along the way. As the Slack vignette at the beginning of the chapter suggests, these frustrations are compelling many companies to look for alternatives.

Overuse is one of the major complaints about email.

Email also suffers from problems with *spam* (unsolicited bulk email) and security risks such as *phishing* (fraudulent messages that prompt unwary users to divulge sensitive information or grant access to protected networks). Spam accounts for roughly half of all email volume and requires great effort to keep it from flooding users' inboxes.[6] Today's systems use spam and threat filters, but these filters are never 100 percent accurate and may also reject messages that are legitimate.

Even with these drawbacks, email still has compelling advantages that will keep it in steady use for years to come. First, email is universal. Anybody with an email address can reach anybody else with an email address, no matter which systems the senders and receivers are on. Second, email is often still the best medium for private, short- to medium-length messages, particularly when the exchange is limited to a small number of people.

PLANNING EMAIL MESSAGES

The solution to email overload starts in the planning step, by making sure every message has a useful, business-related purpose. Also, be aware that many companies now have formal email policies that specify how employees can use email, including restrictions against using company email service for personal messages, sending confidential information, or sending objectionable material. In addition, many employers now monitor email for sensitive content. Regardless of formal policies, though, every email user has a responsibility to avoid actions that could cause trouble.

Do your part to stem the flood of email by making sure you don't send unnecessary messages or cc people who don't need to see particular messages.

Even with short messages, spend a moment or two on the planning tasks described in Chapter 5: analyzing the situation, gathering necessary information for your readers, and organizing your message. You'll save time in the long run because you will craft a

APPLY YOUR SKILLS NOW

Develop Professional-Grade Email Skills

Writing effective, professional-quality email messages is an essential business skill, and you have a great opportunity right now to practice that skill whenever you use email to communicate with your instructors.

- **Choosing when to use email.** First, make sure email is the best channel for each message. In some situations, a phone call, an office visit, or a message sent through your course management system could be a better choice. Second, consider the timing of your message. Writing for help on an assignment at eleven o'clock the night before it is due is not optimal timing.
- **Writing compelling subject lines.** Review the advice on pages 197–198 to craft subject lines that are meaningful and compelling.
- **Greeting.** Address your instructor using the title and name format he or she has requested you to, using "Hi," "Hello," or "Dear." If your instructor hasn't given you guidance, use your best judgment. When in doubt, start out formally, with the appropriate title (Ms., Mr., Dr., or Professor) and his or her last name, and then let your instructor adjust the formality of the exchange in any future communication.
- **Tone.** Be mindful of the tone you are creating through the writing choices you make. For instance, could your messages come across as whiny or demanding, even though you don't intend them to? The right tone can help you achieve whatever goals you have in sending a message.
- **Writing quality.** Write in complete sentences, use standard capitalization, and follow the accepted rules of grammar. Use texting acronyms, emojis, and exclamation points sparingly.

You might feel self-conscious writing in this style at first, but remember that you are practicing a professional skill and showing respect for your instructor, so it's a win-win.

COACH YOURSELF

1. Review several email or text messages you've sent recently (any type of messages on any system). How does their tone feel to you now? Would you change anything about the messages? Why or why not?
2. If you believe you have received an unfair grade on an assignment or a test, what steps could you take to request an adjustment without sounding demanding or unpleasant?

more effective message on the first attempt. Your readers will get the information they need and won't have to generate follow-up messages asking for clarification or additional information.

WRITING EMAIL CONTENT

Business email messages are more formal than the email messages you send to family and friends.

When you approach email writing on the job, recognize that business email is a more formal medium than you are probably accustomed to with email for personal communication (see Figure 7.3). The expectations of writing quality for business email are higher than for personal email, and the consequences of bad writing or poor judgment can be much more serious. Email messages and other digital documents can be used as evidence in lawsuits and criminal investigations, and deleting a message is no guarantee that it can't be recovered by a forensic specialist.[7]

Make your message content easy to skim and easy to read by using short paragraphs, which is particularly helpful for readers on mobile devices with small screens. Use bulleted or numbered lists to break out items, steps, or other groups of elements.

If you use an AI-assisted writing tool such as Gmail's Smart Compose, be sure to review its suggestions to make sure they convey your meaning and nuance.

If you use Google's Gmail or a company email system based on it, you have probably noticed a feature called "Smart Compose," which suggests words and phrases you might want to use as you type. Smart Compose uses AI to analyze the content of your email communication to suggest words and phrases that you are likely to use in a given context. This capability (and others like it sure to emerge in coming years) can help you write routine messages more quickly by reducing the time you spend composing and typing.[8] It can be a handy time saver, but be sure to review these suggestions to make sure they communicate the meaning and nuance you intend.

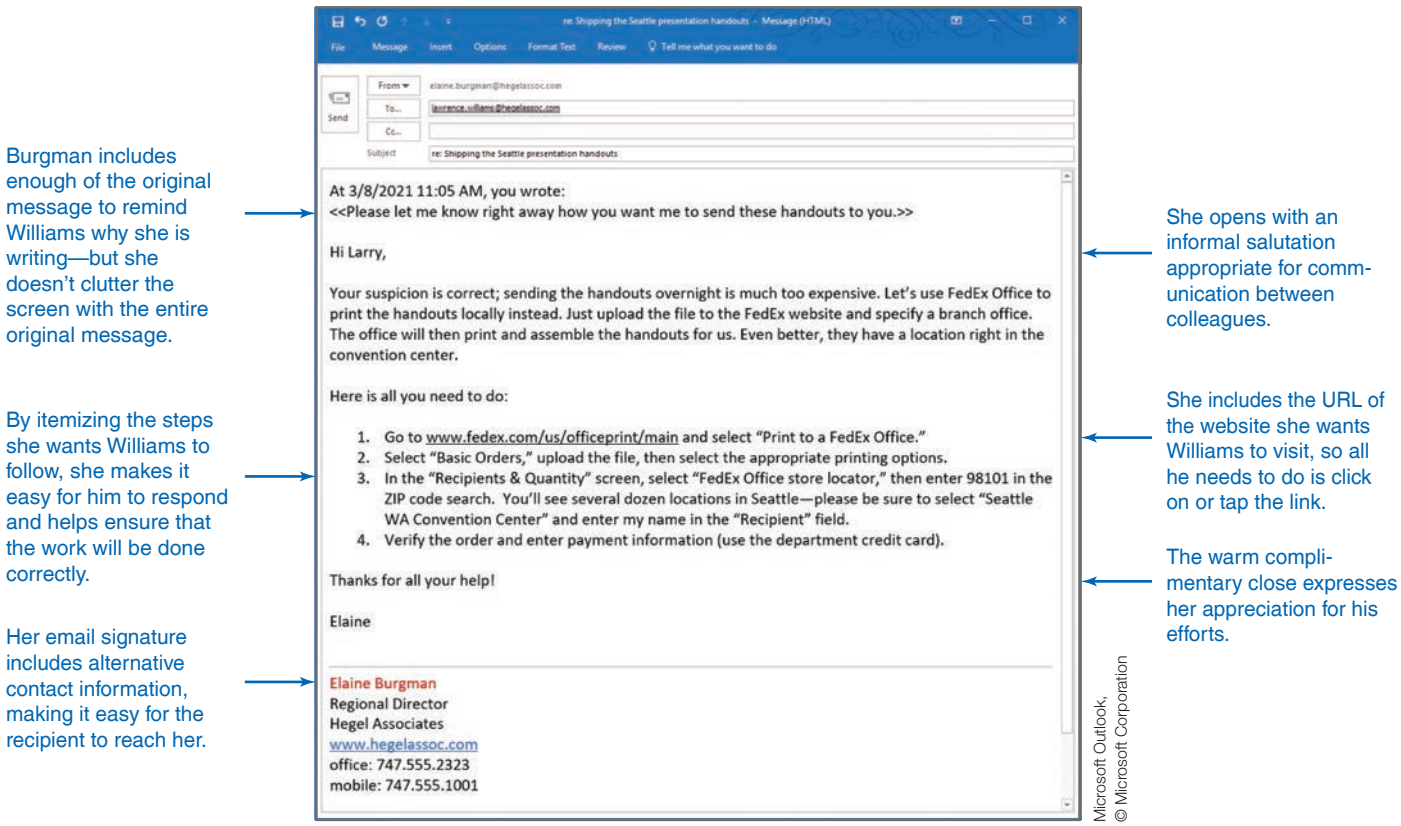


Figure 7.3 Email for Business Communication
In this response to an email query from a colleague, the writer takes advantage of her email system's features to create an efficient and effective message.

THE SUBJECT LINE: PERSUADING PEOPLE TO OPEN YOUR MESSAGES

The email subject line may seem like a small detail, but it is one of the most important parts of an email message because recipients use it to choose which messages to read and when to read them. Many businesspeople receive dozens or hundreds of email messages a day, and subject lines help them decide where to focus their attention. In addition, the subject line often serves as a "browsing label" when people scan their inboxes to find a message they've already read but need to find again.

The subject line is often the most important part of an email message because it can determine whether the message gets read.

The optimum wording for a subject line depends on the message, the situation, your relationship with the recipient(s), and whether you are using the direct or indirect approach in the message. For routine, direct messages among close colleagues or subordinates who are likely to read all your messages, a straightforward description of the message's content is often sufficient. However, if there is a chance that recipients might ignore your message or delay opening it, the subject line requires some creative thought. (Note that the subject lines for marketing and sales messages are a special case that need to function as advertising headlines. Crafting these subject lines is often the responsibility of experienced copywriters.)

For routine, expected email messages to colleagues, a clear description of the message subject is usually adequate.

If your message might be ignored, you need to get more creative with the subject line.

To write a compelling headline when you need to persuade someone to open your message, put yourself in the recipient's shoes. How can you relate the content of your message to this person's immediate needs and interests, and how can you catch his or her attention in just a few seconds?

Compelling subject lines connect the content of the message to the recipient's wants and needs.

Start by identifying issues that are important to the recipient and how he or she is likely to feel about them. What can you do to add positives and remove negatives? For example, someone working in sales wants to close as many deals as possible as quickly

as possible, so anything you can offer that relates to that desire could make good material for a subject line. Similarly, a department manager cares about such things as hitting budgets, keeping employees motivated, and avoiding expensive mistakes. If your message relates to any of those goals, use that in the subject line. Whenever you can, give recipients a "selfish" reason to open your message by conveying that it relates to them and their needs.

Next, if a response is needed by a specific date, indicate that in the subject line (such as "Marketing plan draft for your review; please respond by Dec. 14"). Conversely, if a message doesn't require immediate action, recipients will appreciate knowing this so they can focus on other messages. If you are forwarding information that someone wants to have on file but doesn't need to attend to right now, for instance, you can add "(no action needed)" to the subject line.

When appropriate, look for ways to add intrigue to your subject lines to arouse curiosity.

Finally, look for ways to add intrigue to your subject lines, when appropriate. For example, "July sales results" may accurately describe the content of a message, but "July sales results: good news and bad news" is more intriguing. Readers will want to know why some news is good and some is bad.

For every message, keep these general tips in mind for effective subject lines:

- Make sure you clearly convey the subject of the message. Vague subjects, such as "Interesting idea" or "Update," don't give the reader much motivation to open a message.

Keep subject lines short so they display well on mobile devices.

- Shorter is better. Assume that recipients will see your messages on mobile devices, which often display fewer characters than full-size screens. Limit your subject lines to around 50 characters, or at least make sure that key words and phrases appear in the first 50 characters.[9]
- In addition to the subject line, the inbox listing in many email systems and mobile email apps displays the first line or two of the message content. You can use the first few words of the message body to continue or expand on the subject line. Alternatively, if you are replying to a message, you can include the opening line of the original message to remind the recipient which message you are replying to.
- Revise the subject line if an ongoing thread has altered the focus of the conversation or to distinguish newer messages from older messages with the same subject.

COMPLETING EMAIL MESSAGES

An *email signature* is a small text or graphical file at the end of messages that automatically includes such items as your full name, title, company, and contact information.

Particularly for important messages, taking a few moments to revise and proofread might save you hours of headaches and damage control. Also, favor simplicity when it comes to producing your email messages. A clean, easily readable font, in black on a white background, is sufficient for nearly all email messages. Take advantage of your email system's ability to include an **email signature**, a small file at the end of your messages that automatically includes such items as your full name, title, company, and contact information.

Think twice before hitting Send. A simple mistake in your content or distribution can cause major headaches.

When you're ready to distribute your message, pause to verify what you're doing before you hit Send. Make sure you've included everyone necessary—and no one else. If you're replying to a message, don't hit Reply All if you mean to hit only Reply. The difference could be embarrassing or even career threatening. Don't include people in the cc (courtesy copy) or bcc (blind courtesy copy) fields unless you know how these features work. Everyone who receives the message can see who is on the cc line but not who is on the bcc line. Using bcc can be helpful when you want to protect the privacy of some recipients by not allowing others to see their names or email addresses.

Also, don't set the message priority to "high" or "urgent" unless your message is truly urgent. And if you intend to include an attachment, be sure that it is indeed attached.

To review the tips and techniques for successful email, see Table 7.1 and "Checklist: Creating Effective Email Messages."

TABLE 7.1 Tips for Effective Email Messages

Tip	Why It's Important
When you request information or action, make it clear what you're asking for, why it's important, and how soon you need it; don't make your reader write back for details.	People will be tempted to ignore your messages if they're not clear about what you want or how soon you want it.
When responding to a request, either paraphrase the request or include enough of the original message to remind the reader what you're replying to.	Some businesspeople get hundreds of email messages a day and may need reminding what your specific response is about.
If possible, avoid sending long, complex messages via email.	Long messages are easier to read as attached reports or web content.
Adjust the level of formality to the message and the audience.	Overly formal messages to colleagues can be perceived as stuffy and distant; overly informal messages to customers or top executives can be perceived as disrespectful.
Activate a signature file, which automatically pastes your contact information into every message you create.	A signature saves you the trouble of retyping vital information and ensures that recipients know how to reach you through other means.
Don't let unread messages pile up in your inbox.	You'll miss important information and create the impression that you're ignoring other people.
Never type in all caps.	ALL CAPS ARE INTERPRETED AS SHOUTING.
Don't overformat your messages with background colors, multicolored type, unusual fonts, and so on.	Such messages can be difficult and annoying to read on screen.
Remember that messages can be forwarded anywhere and saved forever.	Don't let a moment of anger or poor judgment haunt you for the rest of your career.
Use the "return receipt requested" feature only for the most critical messages.	This feature triggers a message back to you whenever someone receives or opens your message; some consider this an invasion of privacy.
Make sure your computer or device has up-to-date virus protection.	Infecting other devices as a result of lax virus protection is a serious breach of digital etiquette.
Pay attention to grammar, spelling, and capitalization.	Careless messages make you look unprofessional and can annoy readers.
Use acronyms sparingly.	Shorthand such as IMHO (in my humble opinion) and LOL (laughing out loud) can be useful in informal correspondence with colleagues, but avoid using them in more formal messages.
Be careful with the use of emoticons and emojis.	Some people view the use of these symbols as unprofessional, so make sure you know your audience.
Assume that recipients may read your messages on small mobile screens.	Email is more difficult to read on small screens, so don't burden recipients with long, complicated messages.

CHECKLIST ✓ Creating Effective Email Messages

A. Planning email messages

- Make sure every email message you send is necessary.
- Consider other channels that might be more effective than email.
- Don't cc or bcc anyone who doesn't really need to see the message.
- Follow company email policy; understand the restrictions your company places on email usage.
- Even with brief email messages, spend a moment to plan what you want to convey and the best way to say it.

B. Writing email messages

- Remember that business email is more formal than personal email.
- Recognize that email messages carry the same legal weight as other business documents.
- Pay attention to the quality of your writing and use correct grammar, spelling, and punctuation.
- Make your subject lines informative by clearly identifying the purpose of your message.
- Make your subject lines compelling by wording them in a way that intrigues your audiences.
- Use the first few words of the email body to catch the reader's attention.

C. Completing email messages

- Revise and proofread carefully to avoid embarrassing mistakes.
- Keep the layout of your messages simple and clean, particularly for mobile recipients.
- Use an email signature file to give recipients your contact information.
- Double-check your recipient list before sending.
- Don't mark messages as "urgent" unless they truly are urgent.

Business Messaging

3 LEARNING OBJECTIVE
Identify the major types of business messaging, and list guidelines for effective messaging in the workplace.

Messaging systems and services such as Slack have become an important business communication channel, partly in response to the limitations of email. Messaging supports conversational communication better than any other digital format, so it's a natural for much of the daily communication that occurs within organizations and between organizations and customers.

CATEGORIES OF BUSINESS MESSAGING

Messaging systems come in many formats, from phone-based text messaging to workgroup systems.

Businesses use a variety of services for brief messages, sometimes as standalone systems and other times as a communication function in a larger collaboration or networking system. Messaging comes in many varieties, and the distinctions between the various types aren't always clear, but you can think of messaging in six categories:

- *Text messaging*, sometimes referred to as *short messaging service* (SMS), is primarily a phone-based service. Relative to other formats, businesses were slower to adopt text messaging as a formal communication channel in spite of its massive popularity with phone users. However, with new message-management systems that can handle high volumes of text messages, thousands of companies now include texting as a customer support channel.[11]
- *Direct messaging*, also known as *private messaging*, is a way for users on public social media platforms such as Twitter and Facebook to communicate privately, one-to-one.
- *Instant messaging* was historically a computer-based service but is now widely used on mobile phones.
- *Chat* on the consumer side usually means group chat in chat rooms, whereas on the business side it is usually a one-to-one conversation between a customer and sales or support staff.
- *Enhanced messaging apps*, such as China's WeChat, go well beyond basic messaging capabilities to include shopping, social networking, banking, and more. With roughly 1 billion people using the service every day, WeChat is a dominant force in Chinese business communication.[12]
- *Workgroup messaging* services such as Slack help teams and other workgroups communicate via short messages but usually include many other functions, such as file sharing, scheduling, and searchable message archives (see Figure 7.4).

INTELLIGENT COMMUNICATION TECHNOLOGY

Nice Chatting with You

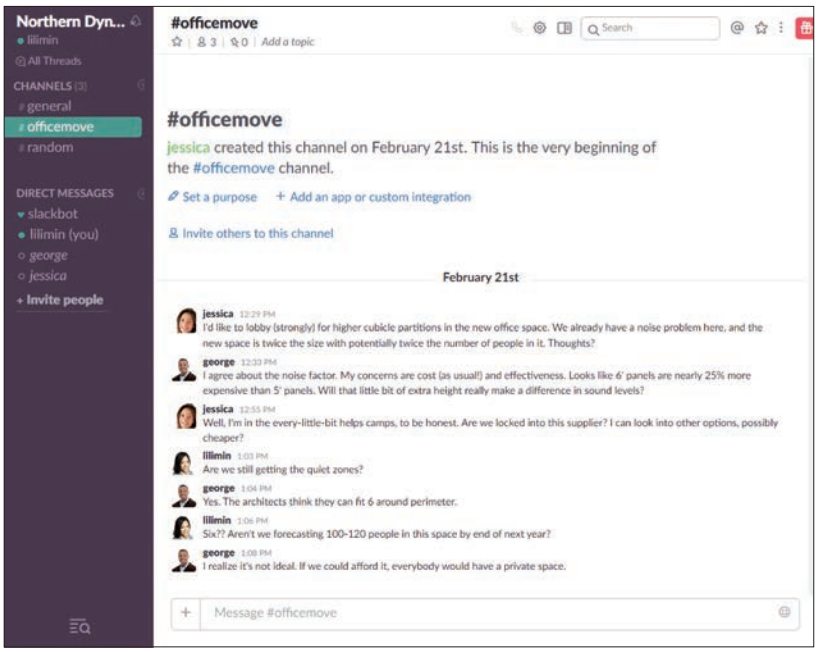
With advances in natural language processing and the growing use of messaging systems for both consumer and business communication, chatbots and taskbots are now common features in digital communication. Microsoft CEO Satya Nadella goes so far as to say, "Bots are the new apps," suggesting they'll transform technology usage the same way mobile apps have. As bot capability is added to more messaging systems and consumer devices, bots are finally entering the mainstream.

Bots are wildly popular on the Slack workgroup messaging system, for example, where they perform such tasks as monitoring the mood of team conversations, taking polls, scheduling meetings, distributing digital documents, and ordering food. (Craving a taco? Taco Bell's TacoBot is ready to take your order.) On Slack, bots are treated just like human team members in many ways—they can send and receive messages, be assigned tasks, and be invited to join specific groups and communication channels.

As bots continue to get better at understanding language, they'll be able to contribute to conversations, such as finding background information that could help solve a problem colleagues are discussing, without anyone asking for their help.[10]

WHAT'S YOUR TAKE?

1. Have you developed a "personal" relationship with any of the bots in your life, whether it's Amazon's Alexa, Microsoft's Cortana, Apple's Siri, Google Assistant, or any other bot? Do you find yourself conversing with a bot as though it were human? If so, what impact do you think this could have on communication habits as bots become even more common?
2. Research the current state of bot communication to identify one way in which the technology is changing or has the potential to change business communication practices. Do you agree with the predictions the experts make? Why or why not?



Courtesy of Slack Technologies, Inc.

Figure 7.4 Workgroup Messaging
Workgroup messaging systems such as Slack combine the convenience of instant messaging with collaboration tools, archiving, search, and other features. On Slack, people can subscribe to specific channels to join or monitor various conversations, and all the messages are stored for easy review.

The same service can be called different things by different people, so don't get too caught up in the labels. Focus instead on techniques for using messaging quickly and effectively in a style that is appropriate for your company.

TIPS FOR SUCCESSFUL MESSAGING

Follow these tips to ensure successful communication on any messaging system:

- **Adjust your tone and level of formality to match the situation.** With close colleagues, you can often relax the standards of writing if doing so helps you communicate quickly and it isn't out of line with company culture. Be aware that on a corporate messaging system, your messages will probably be archived and can be searched by others, so don't write anything you wouldn't want managers or others to see. With customers and other external audiences or colleagues whom you don't know well, maintain a more formal, though still conversational, style (see Figure 7.5). Also, be mindful when messaging people whose native language differs from yours; casual writing can be more difficult for them to grasp quickly.

When messaging with close colleagues, a less formal approach to writing is often acceptable, but be aware of company culture first.

- **Use acronyms carefully.** As with tone and formality, adjust your use of acronyms, such as IMO ("in my opinion") and HTH ("hope that helps"), to match the situation. Acronyms can speed up communication, but they are definitely informal and generally shouldn't be used when communicating with senior managers or customers.

Messaging acronyms can speed up communication, but they generally shouldn't be used when communicating with senior managers or customers.

- **Know your company's security policies.** Messaging systems vary widely in terms of network security, and your firm may have strict rules about the types of communication you are allowed to conduct via text messaging, workgroup messaging, or other platforms.
- **Don't use messaging for lengthy, complex messages.** These systems are optimized for short messages, and reading long messages on them can be a chore. Use email or another format instead.
- **Try to avoid carrying on multiple messaging exchanges at the same time.** This will minimize the chance of sending messages to the wrong people or making one person wait while you tend to another conversation.

To review the advice for effective messaging in the workplace, see "Checklist: Using Business Messaging Productively" on the next page.

MOBILE APP
The **WhatsApp Business App** customizes the popular messaging platform to meet the needs of small business owners.

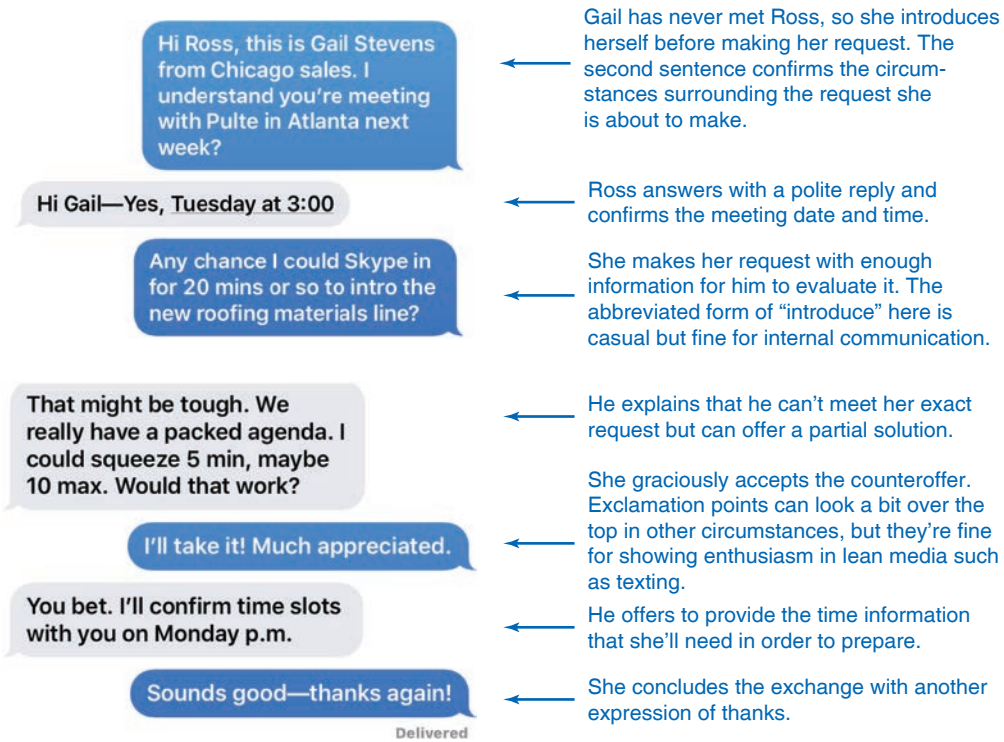


Figure 7.5 Business Text Messaging
Text messaging in a business environment often calls for a slightly more formal approach than you might use for personal communication, particularly if you're writing to someone in the company with whom you don't have a close working relationship. The language is more concise and less formal than you might use in other contexts but is still professional.

CHECKLIST ✓ Using Business Messaging Productively

- Adjust your tone and level of formality to match the situation; you can be casual with close colleagues but not with senior managers or customers.
- Remember that on corporate messaging systems, your messages will probably be archived and can be accessed and searched by others.
- As with email, use your judgment of the situation and company culture when deciding whether to use emoticons and emojis.
- Don't overuse acronyms or emojis, and avoid them when a formal tone is called for.
- Follow your company's security policies regarding the types of communication allowed on messaging systems.
- Don't use messaging for long, complex messages.

Website Content

4 LEARNING OBJECTIVE
Explain why organizing website content is so challenging, and explain the concept of information architecture.

You probably won't develop web content as often as you use email, social networks, and other media, but you might be involved in planning, reviewing, or contributing to your company's website. Most of what you're learning about using other digital media is relevant to website content as well, although the unique nature of websites presents some special challenges. (The information here applies to conventional web content. Blogs and wikis are covered in Chapter 8.)

ORGANIZING WEBSITE CONTENT

The versatility of websites can be both an advantage and a challenge. It's an advantage because a single web presence can serve multiple purposes for multiple audiences. For example, a company website can have sections for potential employees, investors, future

customers, current customers, business partners, the media, and members of the local community.

That versatility can also be a challenge, because it makes websites more difficult to plan and organize than any other communication channel. Each of the target audiences has unique information needs and possibly little interest in the other material that might be on the site. Visitors also enter the site at different points. Some will type in the top-level URL, some will link through to lower-level pages from other websites (a product review in a blog, for example), and many will land on specific pages after using a search engine.

The versatility of websites can make them a challenge to organize because different visitors want different types of information.

To be most effective, a website needs to provide each type of visitor a clear path into the information he or she wants (see Figure 7.6). Website designers use the term **information architecture** to describe the structure and navigational flow of all parts of a website. As they develop a site plan, information architects need to anticipate how various audiences will enter and explore the site, based on the information the visitors are likely to be searching for.

A website's *information architecture* defines the site's structure and navigational flow.

If you're responsible for designing or approving the structure of a website, keep the following advice in mind:

- Given the sizable percentage of readers who now access websites with tablets and smartphones, many companies opt for a *mobile-first* design approach that supports touch interaction with simplified navigation.
- Give your readers control by creating links and pathways that let them explore on their own.
- Use simple, clear language for page titles and links so that visitors always know where they are and where a link will take them.
- Follow the conventions used by most business websites, such as having an "About Us" page that describes the company and a "Contact Us" page with phone, email, and messaging details.
- Help online readers scan and absorb information by breaking it into self-contained, easily readable chunks that are linked together logically. This is particularly helpful for mobile readers.

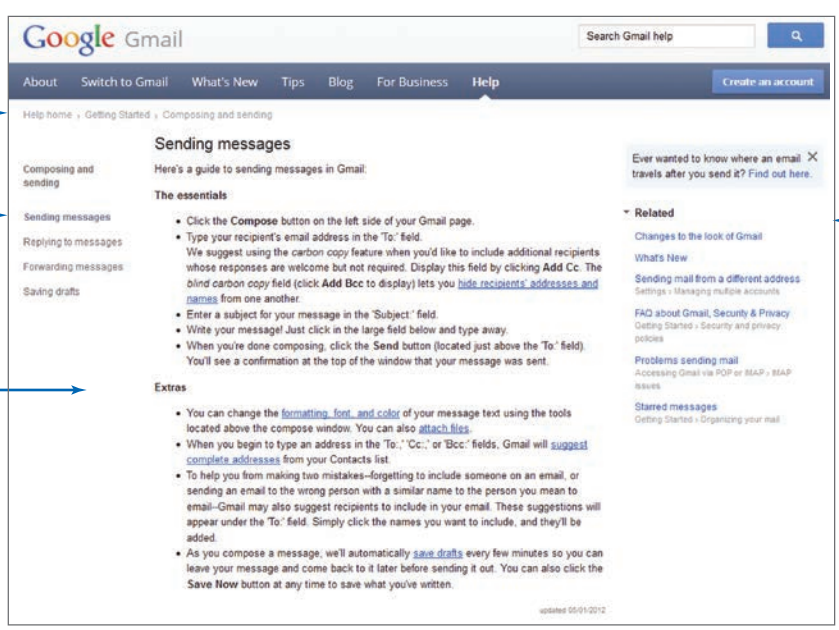
MOBILE APP

Weebly offers a simple way to create mobile-friendly websites.

The "breadcrumb" trail shows visitors where they are and makes it easy to climb up the hierarchy to higher-level pages.

Content is organized in a logical and visible hierarchy (with four subtopics under the heading of "Composing and sending").

By dividing the content into *essentials* and *extras*, the page helps visitors focus on material they are most likely to need first.



Readers don't always know how to phrase what they are looking for, so the list of related topics might help if this page doesn't offer the information they need.

Screenshot of Google Gmail

Figure 7.6 Organizing Website Content

This page from the Google Help feature for Gmail demonstrates several good points about organizing website content.

DRAFTING WEBSITE CONTENT

Everything you know about effective writing applies to web content, but keep these extra points in mind as well (see Figure 7.7):

- Because readers can be skeptical of online content, take special care to build trust with your intended audiences. Make sure your content is accurate, current, complete, and authoritative.
- As much as possible, adapt your content for a global audience. AI-enhanced translation tools can reduce the time and cost of translating web content.
- Wherever you can, use the *inverted pyramid* style, in which you cover the most important information briefly at first and then gradually reveal successive layers of detail—letting readers choose to see those additional layers if they want to.
- Present your information in a concise, skimmable format. Effective websites use a variety of means to help readers skim pages quickly, including lists, color and boldface, informative headings, and helpful preview summaries that give readers the option of learning more if they choose to do so.

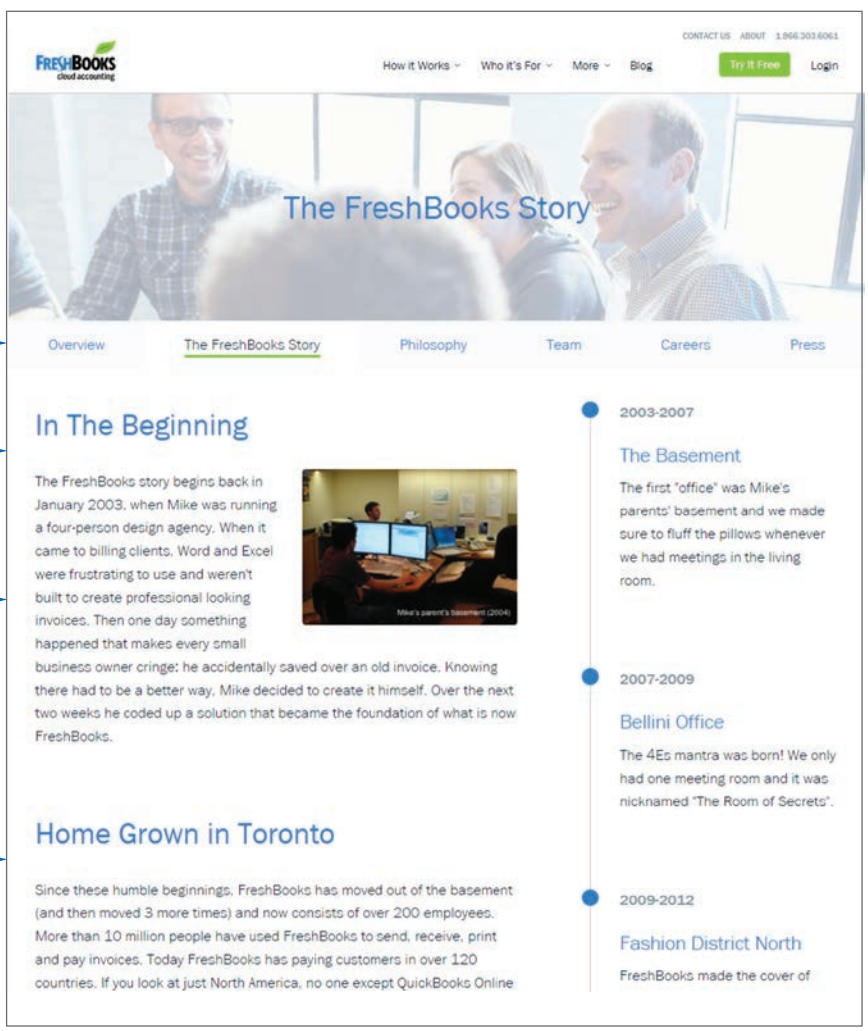
With the inverted pyramid style, summarize the key points at the beginning of a webpage, and then move on to provide details.

Thanks to the concise and clear navigation labels, headings, and subheadings, readers can skim down the screen and get all the key points in a matter of seconds.

With an uncluttered layout and generous use of white space, the page is visually inviting and easy to read.

Notice how it follows the contemporary convention of sans serif typefaces for both headings and text. In fact, it's the same typeface for both applications, giving the page a particularly unified look and feel.

The screen is divided into two unequal columns, with the main narrative taking 2/3 of the width on the left side and a dated timeline taking the remaining 1/3 down the right side. Even though two threads are on display at once, the proportion of space and the font sizes make it immediately obvious which section is primary and which is secondary.



Courtesy of Fresh Book cloud Accounting

Figure 7.7 Writing and Designing for the Web
This section of the company history page on the website of the software developer FreshBooks demonstrates effective design and writing choices.

- Write concise, reader-friendly links that serve for both site navigation and content skimming. Clearly identify where a link will take readers, and don't use wordplay that forces readers to guess what a section or page is about.
- Keep content up to date. If content on a page is likely to go out of date over time, include an indication on the page of when it was last updated to help readers judge whether it is current when they read it.

Podcasting

5 LEARNING OBJECTIVE
Explain how to adapt the three-step writing process to podcasting.

Podcasting is the process of recording audio or video files and distributing them online. Podcasting combines the media richness of voice or visual communication with the convenience of portability. Audiences can listen to or watch podcasts on a blog or website, or they can download them to phones or portable music players to consume on the go. Particularly with audio podcasts, the hands-off, eyes-off aspect makes them great for listening while driving or exercising.

Podcasting is the process of recording audio or video files and distributing them online

Podcasting has blossomed in popularity among the general public, and businesses are taking notice. Microsoft, eBay, IBM, Slack, McKinsey & Company, and General Electric are just a few of the many companies that now use podcasting to share information and inspiration with customers and other stakeholders.[13]

As podcasting has grown in popularity, many businesses now host their own podcast channels.

You can think of business podcasting as the audio or video equivalent of blogging, in that you are regularly sharing in-depth content on a consistent topic. As with blogging, it's important to choose a subject area that is rich enough to sustain an ongoing series of episodes, which is sometimes referred to as a *podcasting channel*.

The three-step writing process adapts nicely to individual podcast episodes, with some obvious modifications for the audio or video medium. Some podcasters take an unstructured, improvisational approach; others carefully script podcasts and produce them with nearly the same quality as commercial radio and television programs. With any approach, capturing and keeping the audience's attention is vital. In this regard, view podcasting in the same way as speeches and presentations. Not surprisingly, storytelling is a popular and powerful format for podcasts because it uses a dramatic arc to build and sustain tension.

Whether you take an informal, improvisational approach or carefully script podcasts, capturing and keeping the audience's attention is crucial.

As you organize the content for a podcast, pay close attention to previews, transitions, and reviews. These steering devices are especially vital in audio recordings because audio lacks the "street signs" (such as headings) that audiences rely on in written and visual media. Moreover, scanning back and forth to find specific parts of an audio or video message is much more difficult than with textual messages, so you need to do everything possible to make sure your audience successfully receives and interprets your message on the first try.

Steering devices such as transitions, previews, and reviews are vital in podcasts.

The completing step is where podcasting differs most dramatically from written communication, for the obvious reason that you are recording and distributing audio or video files. Particularly for more formal podcasts, start by revising your script or thinking through your speaking notes before you begin to record. The closer you can get to recording your podcasts in one take, the more productive you'll be. In addition, editing audio and video can be considerably more difficult than editing text, so careful planning can be a big time saver.

Editing is more difficult with podcasts than with textual messages, so it's wise to start from a solid script or notes.

Most personal computers, smartphones, and tablets now have basic audio recording capability, and free or low-cost apps to manage recording and distribution are widely available (see Figure 7.8 on the next page). These tools can be sufficient for creating informal podcasts, but you'll need additional pieces of hardware and software to achieve the higher production quality expected in corporate podcasts. These can include an audio processor (to filter out extraneous noise and otherwise improve the audio signal), a mixer (to combine multiple audio or video signals), a higher-quality microphone, more-sophisticated recording and editing software, and perhaps some physical changes in your recording location to improve the acoustics.

MOBILE APP
Mobile Podcaster lets you record audio podcasts on your iOS devices and instantly post them on your WordPress blog.



Copyright 2019 - Spreaker Inc. a Voxnest Company

Figure 7.8 Podcasting Tools
Podcasting tools such as Spreaker Studio are available for personal computers, smartphones, tablets, and even smartwatches, making it easy to create and distribute business podcasts from just about anywhere.

Podcasts can be distributed in several ways, including through media stores such as iTunes, by dedicated podcast hosting services, or on a company's own website or blog.

For a quick review of the key points of business podcasting, see "Checklist: Planning and Producing Business Podcasts."

CHECKLIST ✓ Planning and Producing Business Podcasts

- If you intend to podcast with a regular stream of new content, make sure you've identified a theme or purpose that is rich enough to sustain your effort.
- Decide whether you want to improvise or speak from a written script.
- Pay close attention to previews, transitions, and reviews to help prevent your audience from getting lost.
- If you improvise, do enough planning and organization to avoid floundering and rambling in search of a point.
- Remember that editing is much more difficult to do with audio or video than with text content, so plan your content and recording carefully.

COMMUNICATION CHALLENGES AT Slack

You work as a product manager in Slack's San Francisco offices. In this role you lead a cross-functional team responsible for defining new features for the Slack platform and working with professionals in engineering, marketing, sales, and finance to bring these new capabilities to market. These people are geographically dispersed, so much of your communication takes place via written team messaging, not in person or in online meetings. Apply what you've learned about messaging to address these two challenges.

INDIVIDUAL CHALLENGE: Software companies usually keep wish lists of new features, combining requests from customers, ideas submitted by insiders, and capabilities that are part of a long-term product plan. Choosing which of these ideas to implement for a given software update is no simple task and often requires trade-offs among time, cost, market demand, competitive moves, staffing, and other variables. Earlier this week, someone from the sales department said customers are clamoring for a particular feature,

but the engineers responded that it will take too long to implement for the next scheduled software update, so they proposed an interim capability that they acknowledge is a good but not truly great solution. The marketing people then chimed in with the concern that promoting a less-than-ideal feature set could dampen the product's momentum in the marketplace. After this spirited discussion had been going on for several days, someone on the team from accounting wrote, quite bluntly, that it was time to stop all this chatter and make a decision already. He said he was under pressure to update the engineering and marketing budgets, and he couldn't do his work if everyone else on the team was "wandering around in circles" without making a decision.

In your role as the leader of this team, write a brief response (no more than one paragraph). Be sure to consider the need to convey whatever information you intend to share and the need to smooth out the inevitable tension the accountant's message has produced. Make up whatever information you need while imagining yourself in the role of a product manager.

TEAM CHALLENGE: With a team assigned by your instructor, discuss the scenario described in the individual challenge and identify several other business scenarios in which important questions need to be batted around by various members of a team before they can reach a decision. As with many decision-making challenges, there is tension between needing to make a decision and making sure you've collected and analyzed all the information you need to make the best possible decision. Brainstorm a set of guidelines that teams in any company could use to handle these decision-making challenges. Produce a brief document that could be posted on a collaboration platform such as Slack.

Key Terms

email signature A small file that automatically includes such items as your full name, title, company, and contact information at the end of your messages

information architecture Plan or map of the content structure, labeling, and navigational flow of all the parts of a website

podcasting Process of recording audio or video files and distributing them online

Summary of Learning Objectives

1 Identify the major digital media formats available for business messages, and list nine compositional modes used in digital media. Major digital media for business messages include email, messaging, web content, podcasting, social networks, information- and media-sharing sites, wikis, blogging and microblogging, and online video. The nine compositional modes used in digital communication are conversations, comments and critiques, orientations, summaries, reference materials, narratives, teasers, status updates and announcements, and tutorials and FAQs.

2 Explain how to adapt the three-step writing process to email messages, and describe the importance of email subject lines. The three-step process adapts easily to email communication. One of the most important planning decisions in crafting email is making sure every message has a valuable purpose. Any key planning decision should, in most instances, follow the chain of command in your organization; emailing over your boss's head is a good way to stir up resentment. When writing email messages, bear in mind that the expectations of writing quality and formality are higher in business email. Completing email messages is straightforward. Proof and revise messages (particularly important ones), stick with a clean design, make use of the email signature feature, and make sure you distribute the message to the right people.

The subject line can be the most important part of an email message because it often determines whether and when recipients open and read the message. Effective subject lines are both informative (concisely identifying what the message is about) and compelling (giving recipients a reason to read the message).

3 Identify the major types of business messaging, and list guidelines for effective messaging in the workplace. Messaging comes in many varieties, and the distinctions between the various types aren't always clear, but you can think of messaging in six categories: phone-based text messaging, direct messaging on social media platforms, instant messaging (IM), chat, enhanced messaging apps, and workgroup messaging systems. Here are guidelines for using messaging effectively in the workplace:

- Adjust your tone and level of formality to match the situation
- Use acronyms carefully
- Know your company's security policies
- Don't use messaging for lengthy, complex messages
- Try to avoid carrying on multiple messaging exchanges at the same time

4 Explain why organizing website content is so challenging, and explain the concept of information architecture. The primary challenge in organizing website content is the medium's extreme versatility. This versatility can be an advantage because a single web presence can serve multiple purposes for multiple audiences, but it also creates the challenge of providing an efficient and successful experience for all these unique visitors. The key to organizing a website is careful consideration of its information architecture, which is a map of the content structure, labeling, and navigational links and pathways in a website.

5 Explain how to adapt the three-step writing process to podcasting. Although you'll be recording audio or video when creating podcasts, rather than writing messages, using the three-step process is an effective way to develop podcasts. Focus the planning step on analyzing the situation, gathering the information you'll need, and organizing your material. If you plan to create a series of podcasts on a specific theme, make sure you've identified a range of topics extensive enough to keep your podcasts going over time. As you

organize and begin to think about the words or images you'll use as content, pay close attention to previews, transitions, and reviews so that audiences don't get lost while listening or watching. Before you record, think through what you plan to say or shoot so you don't ramble while trying to make your key points. Finally, consider the necessary level of production quality; good-quality podcasts usually require some specialized hardware and software.

Test Your Knowledge

To review chapter content related to each question, refer to the indicated Learning Objective.

7-1. What are the situations in which a printed memo or letter might be preferable to a digital message? [LO-1]

7-2. How do the compositional modes of orientations, summaries, and teasers differ? [LO-1]

7-3. Why has email become overused and inappropriately used in many situations? [LO-2]

7-4. Why are subject lines important in email messages? [LO-2]

7-5. What are the benefits of using messaging in business communication? [LO-3]

7-6. Should you ever plan a messaging exchange? Explain your answer. [LO-3]

7-7. What is information architecture? [LO-3]

7-8. How can you use the inverted pyramid style of writing to craft effective website content? [LO-4]

7-9. Why is it important to have a long-term, sustainable purpose in mind before you launch a podcast channel? [LO-5]

7-10. Is it wise to speak "off the cuff," with no notes or outline, when recording business podcasts? Why or why not? [LO-5]

Apply Your Knowledge

To review chapter content related to each question, refer to the indicated Learning Objective.

7-11. Your company just designed its website, and you want to include some information on the homepage to help visitors find the information they need. Should you write a summary, an orientation, or a teaser to accomplish this goal? [LO-1]

7-12. If you wanted to get your employees' attention about the need to reduce costs without starting up the rumor mill about the possibility of layoffs, would it be wise to send out an email with the subject line "To save everyone's job, we must reduce costs now"? Explain your answer. [LO-2]

7-13. How do effective email subject lines reflect the "you" attitude? [LO-2]

7-14. What are the risks of using emoticons and emojis in business communication? [LO-2]

7-15. Communication on a major project is suffering because several team members are in the habit of writing cryptic or careless messages on the workgroup messaging system that the team uses. These messages often force recipients to engage in several rounds of follow-up messaging to figure out what the sender had in mind. As project leader, you've spoken with these team members about the need to write clearer messages, but they respond that careful planning and writing defeats the whole purpose of *instant* messaging. How should you handle the situation? [LO-3]

7-16. Your company's webmaster has become a big fan of tagging, the practice of identifying web content with category labels to make it easy to later retrieve all the content on a particular topic. She thinks tags are so powerful, in fact, that there is no longer any need to organize a website in any conventional, structured way. By using tag filtering, she claims, people can find whatever they need. In an email message, explain to her why information architecture is still necessary. [LO-4]

7-17. Imagine that you've been on the job for two or three decades, and you've amassed a deep store of leadership wisdom during the years. As CEO, you'd like to share your wisdom with your 800 employees in a biweekly podcast. How should you plan this podcast channel to encourage your employees to listen regularly? [LO-5]

Practice Your Skills

Message for Analysis

7-18. Media Skills: Messaging, Creating a Businesslike Tone [LO-3] Review this instant messaging exchange and explain how the customer service agent could have handled the situation more effectively.

AGENT:	Thanks for contacting Home Exercise Equipment. What's up?
CUSTOMER:	I'm having trouble assembling my home gym.
AGENT:	I hear that a lot! LOL
CUSTOMER:	So is it me or the gym?
AGENT:	Well, let's see haha! Where are you stuck?
CUSTOMER:	The crossbar that connects the vertical pillars doesn't fit.
AGENT:	What do you mean doesn't fit?
CUSTOMER:	It doesn't fit. It's not long enough to reach across the pillars.
AGENT:	Maybe you assembled the pillars in the wrong place. Or maybe we sent the wrong crossbar.
CUSTOMER:	How do I tell?
AGENT:	The parts aren't labeled so could be tough. Do you have a measuring tape? Tell me how long your crossbar is.

Exercises

Each activity is labeled according to the primary skill or skills you will need to use. To review relevant chapter content, you can refer to the indicated Learning Objective. In some instances, supporting information will be found in another chapter, as indicated.

7-19. Collaboration: Working in Teams; Planning: Selecting Media [LO-1], Chapter 2 For each of these message

needs, choose a medium that you think would work effectively and explain your choice. (More than one medium could work in some cases; just be able to support your choice.)

a. A technical support service for people trying to use their digital music players
b. A message of condolence to the family of an employee who passed away recently
c. A message from the CEO of a small company to the employees of the firm, explaining that she is leaving the company to join a competitor
d. A series of observations on the state of the industry, intended mostly for professionals within the industry
e. A series of messages, questions, and answers surrounding the work of a team on a confidential company project

7-20. Media Skills: Writing Email Subject Lines [LO-2] Using your imagination to make up whatever details you need, revise the following email subject lines to make them more informative:

a. New budget figures
b. Marketing brochure—your opinion?
c. Production schedule

7-21. Media Skills: Email [LO-2] The following email message contains numerous errors related to what you've learned about planning and writing business messages. Using the information it contains, write a more effective version.

SUBJECT: Those are the breaks, folks

Some of you may not like the rules about break times; however, we determined that keeping track of employees while they took breaks at times they determined rather than regular breaks at prescribed times was not working as well as we would have liked it to work. The new rules are not going to be an option. If you do not follow the new rules, you could be docked from your pay for hours when you turned up missing, since your direct supervisor will not be able to tell whether you were on a "break" or not and will assume that you have walked away from your job. We cannot be responsible for any errors that result from your inattentiveness to the new rules. I have already heard complaints from some of you and I hope this memo will end this issue once and for all. The decision has already been made.

Starting Monday, January 1, you will all be required to take a regular 15-minute break in the morning and again in the afternoon, and a regular thirty-minute lunch at the times specified by your supervisor, NOT when you think you need a break or when you "get around to it."

There will be no exceptions to this new rule!

Felicia August

Manager, Billing and Accounting

7-22. Media Skills: Messaging [LO-3] Assume you need to share news about a schedule slip on a customer project you are managing. You had originally promised it would be finished by June 1, but you now believe it won't be finished until June 20. The reason for the delay is a holdup in receiving some necessary materials from another company. Write a brief message to update the customer and apologize for the delay. You and the customer are on a shared channel on Slack that is dedicated to updates on the project, so you don't need to address the message to anyone in particular. Make up any details you need to write a realistic message.

7-23. Media Skills: Messaging, Creating a Businesslike Tone [LO-3] Your firm, which makes professional-grade paint sprayers, uses messaging extensively for internal communication and frequently for external communication with customers and suppliers. Several customers have recently forwarded copies of messages they've received from your staff, asking if you know how casually some employees are treating this important medium. You decide to revise parts of several messages to show your staff a more appropriate writing style. Rewrite these sentences, making up any information you need, to convey a more businesslike style and tone. (Look up the acronyms online if you need to.)

a. IMHO, our quad turbo sprayer is best model 4U.
b. No prob; happy2help!
c. FWIW, I use the L400 myself & it rocks.
d. Most cust see 20–30% reduct in fumes w/this sprayer—of course, YMMV.

7-24. Media Skills: Web Writing, Planning: Outlining Your Content [LO-4] Find the website of a small company or nonprofit organization; make sure it is a fairly small and simple website. Identify all the individual pages on the site, and then, as best you can, "reverse engineer" the site's information architecture, identifying all the linkages between the individual pages. Draw a map of the architecture, showing how the various pages are linked together. (Hint: If the website has a "Site map" link, select that to see a hierarchical list of all the pages contained within the site.)

7-25. Media Skills: Podcasting, Planning: Outlining Your Content [LO-5] You began recording a weekly podcast to share information with your large and far-flung staff. After a month, you ask for feedback from several of your subordinates, and you're disappointed to learn that some people stopped listening to the podcast after the first couple of weeks. Someone eventually admits that many staffers feel the recordings are too long and rambling, and the information they contain isn't valuable enough to justify the time it takes to listen. You aren't pleased, but you want to improve. An assistant transcribes the introduction to last week's podcast so you can review it. You immediately see two problems. Revise the introduction based on what you've learned in this chapter.

So there I am, having lunch with Selma Gill, who just joined and took over the Northeast sales region from Jackson Stroud. In walks our beloved CEO with Selma's old boss at Uni-Plex; turns out they were finalizing a deal to co-brand our products and theirs and to set up a joint distribution program in all four domestic regions. Pretty funny, huh? Selma left Uni-Plex because she wanted to sell our products instead, and now she's back selling her old stuff, too. Anyway, try to chat with her when you can; she knows the biz inside and out and probably can offer insight into just about any sales challenge you might be running up against. We'll post more info on the co-brand deal next week; should be a boost for all of us. Other than those two news items, the other big news this week is the change in commission reporting. I'll go into the details in a minute, but when you log onto the intranet, you'll

now see your sales results split out by product line and industry sector. Hope this helps you see where you're doing well and where you might beef things up a bit. Oh yeah, I almost forgot the most important bit. Speaking of our beloved CEO, Thomas is going to be our guest of honor, so to speak, at the quarterly sales meeting next week and wants an update on how petroleum prices are affecting customer behavior. Each district manager should be ready with a brief report. After I go through the commission reporting scheme, I'll outline what you need to prepare.

Expand Your Skills

Critique the Professionals

Check out the Twitter accounts of several companies that sell products or services you use or might use in the future. Find three teaser messages that attempt to persuade you to click through to another website. In a brief summary on your class blog or in an email message to your instructor, compare the effectiveness of the three teasers. Which was most effective, and which was least effective? Why? Were the payoffs for all three teasers satisfactory and in line with what you expected to see?

Sharpening Your Career Skills Online

Find a website, video, article, podcast, or presentation that offers advice on writing effective email and messages for mobile devices. Write a brief email message to your instructor, describing the item that you found and summarizing the career skills information you learned from it.

Build Your Career

In the Build Your Career activities in Chapters 5 and 6, you started the first two steps of your brand pyramid, the *private inventory* of skills, attributes, experience, and areas for improvement and the *public profile* that highlights the qualities you want to promote.

Now it's time to complete the pyramid with your *headline*, also known as a *tagline* or *elevator pitch*. This is a brief, clear, and memorable statement of the value you bring to an organization as an employee or a freelance contractor. Envision this as the answer to common questions you will hear at networking events, during job interviews, and in casual encounters:

- So, tell me about yourself.
- What do you do?
- Why should we hire you?

Like any good headline, your personal headline should offer a concise summary and leave the listener wanting more. You have only a few seconds to make an impression, so make sure every word counts. Follow these steps:

1. Choose two or three high-impact keywords from the research you've done. The example on page xxxix in the Prologue, "I am a data science major ready to make numbers come alive through leading-edge techniques in deep learning, data mining, and visualization," uses three job description keywords: *deep learning*, *data mining*, and *visualization*.
2. Build a sentence around the words that convey how you are qualified to deliver those capabilities.
3. If you don't have a lot of relevant job experience, use your education as your strongest selling point, as the data science major does in this example.
4. Consider crafting two versions, one slightly more formal for written use and one slightly more casual for spoken use. For example, the "make numbers come alive" phrase might sound a little too salesy in casual networking conversation. Your spoken version might be ". . . ready to help companies apply leading-edge techniques . . ."
5. Get comfortable saying your spoken version out loud so that it rolls off your tongue.
6. Be ready with supporting details when someone asks, "That sounds great—tell me more."

Cases

For all cases, feel free to use your creativity to make up any details you need to craft effective messages.

EMAIL SKILLS

7-26. Media Skills: Email; Message Strategies: Routine Messages [LO-2], Chapter 10 Team messaging apps are improving communication in all kinds of organizations, from small teams to entire companies to school groups and other nonbusiness entities.

Your task: Imagine that you are responsible for choosing an organization's new messaging software. You can use an organization you are already a member of, such as a current or past employer, a nonprofit where you volunteer, or a project team in one of your classes. Alternatively, choose any real or imaginary organization in which at least a few people would need to coordinate their efforts using text-centric messaging.

Research the capabilities of Slack and two of its competitors, identifying the three or four most important features of each system. Write an email message (no more than four paragraphs) comparing these key features and recommending one of the systems for your chosen organization.

EMAIL SKILLS

7-27. Media Skills: Email; Message Strategies: Negative Messages [LO-2], Chapter 11 Many companies operate on the principle that the customer is always right, even when the customer isn't right. They take any steps necessary to ensure happy customers, lots of repeat sales, and

a positive reputation among potential buyers. Overall, this is a smart and successful approach to business. However, most companies eventually encounter a nightmare customer who drains so much time, energy, and profits that the only sensible option is to refuse the customer's business. For example, the nightmare customer might be someone who constantly berates you and your employees, repeatedly makes outlandish demands for refunds and discounts, or simply requires so much help that you not only lose money on this person but also no longer have enough time to help your other customers. "Firing" a customer is an unpleasant step that should be taken only in the most extreme cases and only after other remedies have been attempted (such as talking with the customer about the problem), but it is sometimes necessary for the well-being of your employees and your company.

Your task: If you are currently working or have held a job in the recent past, imagine that you've encountered just such a customer. If you don't have job experience to call on, imagine that you work in a retail location somewhere around campus or in your neighborhood. Identify the type of behavior this imaginary customer exhibits and the reasons the behavior can no longer be accepted. Write a brief email message to the customer to explain that you will no longer be able to accommodate him or her as a customer. Calmly explain why you have had to reach this difficult decision. Maintain a professional tone and keep your emotions in check.

EMAIL SKILLS/TEAM SKILLS

7-28. Media Skills: Email; Collaboration: Team Projects [LO-2], Chapter 2 Colleges and universities are complex organizations that try to optimize results for students while wrestling with budgetary constraints, staffing issues, infrastructure concerns, limitations on available space, and a host of other issues. Even in the best-managed and most generously funded institutions, there are aspects of campus life that could be improved.

Your task: With a team assigned by your instructor, choose an issue of campus life that you think could and should be improved. It can be anything from transportation to housing to personal safety. Draft an email message that could be sent to your school's administration. In your message concisely describe the problem, speculate on why the problem or situation exists, offer suggestions on how it could be solved or improved, and explain how addressing it would improve campus life. (Don't send the message unless your instructor directs you to do so.)

EMAIL SKILLS/TEAM SKILLS

7-29. Media Skills: Email [LO-2] Studying real-life examples is a great way to get a feel for how various companies communicate with customers and other stakeholders.

Your task: With your teammates, select five email messages from the Just Good Copy website at **www.goodemailcopy.com**. Evaluate them based on the criteria for effective email discussed in this chapter. Rank them from most effective to least effective and summarize your analysis in a presentation to your class or a post on your class blog.

EMAIL SKILLS/MOBILE SKILLS

7-30. Media Skills: Email [LO-2] The size limitations of smartphone screens call for a different approach to writing (see page 149) and formatting (see page 174) documents.

Your task: On the website of any company that interests you, find a news release (some companies refer to them as *press releases*) that announces the launch of a new product. Using Pages or any other writing app at your disposal, revise and format the material in a way that would be effective on smartphone screens.

MESSAGING SKILLS

7-31. Media Skills: Messaging [LO-3] Keeping track of deadlines, to-do lists, and other details is a challenge for every professional. You've been researching apps to help with this, and you're intrigued by one called Moo.do. You'd like to tell your colleagues about its key features and ask if it's something the team should consider adopting.

Your task: Visit **www.moo.do** and learn more about the product. Choose three features that you think are useful and summarize them in a message of no more than 300 characters that you could post on your company's workgroup messaging system. (You can quote brief passages from the Moo.do website for this exercise, but make the bulk of the message your own writing.)

MESSAGING SKILLS

7-32. Media Skills: Messaging [LO-3] As more and more consumers and businesses use apps and online services to transfer money and conduct other financial transactions, people are naturally concerned about security.

Your task: You work in customer communications for Venmo, which makes a popular money-transfer app. Your team gets quite a few inquiries about security, so you've decided to write a standard reply that you and your colleagues can send via email or through the chat function in the Venmo app. Visit **www.venmo.com** and review the information on security. Write a message of no more than 400 characters that describes the steps Venmo takes to keep customer accounts secure. (For the purposes of this exercise, it is acceptable to use some of the specific phrasing you find on the Venmo website, but make the bulk of the message your own writing.)

MESSAGING SKILLS

7-33. Media Skills: Messaging; Compositional Modes: Tutorials [LO-1], [LO-3] High-definition television can be a joy to watch—but, oh, what a pain to buy. The field is cluttered with competing technologies and arcane terminology that is meaningless to most consumers. Moreover, it's nearly impossible to define one technical term without

invoking two or three others, leaving consumers swimming in an alphanumeric soup of confusion. As a sales support manager for Crutchfield, a leading online retailer of audio and video systems, you understand the frustration buyers feel; your staff is deluged daily by their questions.

Your task: To help your staff respond quickly to consumers who ask questions via Crutchfield's online IM chat service, you are developing a set of "canned" responses to common questions. When a consumer asks one of these questions, a sales adviser can simply select the ready-made answer. Visit **www.crutchfield.com** and conduct the research you need to write concise, consumer-friendly definitions of the following terms: *1080p, 4K*, and *High Dynamic Range (HDR)*.

WEB WRITING SKILLS/TEAM SKILLS

7-34. Message Strategies: Online Content; Collaboration: Team Projects [LO-4], Chapter 2 If you're like many other college students, your first year was more than you expected: more difficult, more fun, more frustrating, more expensive, more exhausting, more rewarding—more of everything, positive and negative.

Your task: With several other students, identify five or six things you wish you would have realized or understood better before you started your first year of college. These can relate to your school life (such as "I didn't realize how much work I would have for my classes" or "I should've asked for help sooner") and your personal and social life ("I wish I would've been more open to meeting people"). Use these items as the foundation of a brief informational report that you could post on a blog that is read by high school students and their families. Your goal with this report is to help the next generation of students make a successful and rewarding transition to college.

WEB WRITING SKILLS/MOBILE SKILLS/PORTFOLIO BUILDER

7-35. Message Strategies: Online Content [LO-4] Adapting conventional web content to make it mobile friendly can require rethinking the site's information architecture to simplify navigation and content.

Your task: Choose the website of a company that makes products you find interesting. (Make it a conventional website, not one already optimized for mobile.) Analyze the section of the website that contains information about the company's products and determine the best way to present that material on mobile device screens. Mock up at least two screens showing how you would reformat the content to make it mobile friendly. Create a brief presentation with "before" and "after" views to show how your redesign would benefit mobile site visitors.

WEB WRITING SKILLS

7-36. Message Strategies: Online Content [LO-4] As you probably experienced, trying to keep all the different schools straight in one's mind while researching and applying for college can be rather difficult. Applicants and their families would no doubt appreciate a handy summary of your college or university's key points as they relate to the selection and application process.

Your task: Adapt content from your college or university's website to create a one-page "Quick Facts" sheet about your school. Choose the information you think prospective students and their families would find most useful. (Note that adapting existing content would be acceptable in a real-life scenario like this because you would be reusing content on behalf of the content owner. Doing so would definitely not be acceptable if you were using the content for yourself or for someone other than the original owner.)

PODCASTING SKILLS

7-37. Media Skills: Podcasting; Career Management: Personal Branding [LO-5], Prologue While writing the many letters and email messages that are part of the job search process, you find yourself wishing that you could just talk to some of these companies so your personality could shine through. Well, you've just gotten that opportunity. One of the companies that you've applied to has emailed you back, asking you to submit a two-minute podcast introducing yourself and explaining why you would be a good person to hire.

Your task: Identify a company that you'd like to work for after graduation and select a job that would be a good match for your skills and interests. Write a script for a two-minute podcast (roughly 250 words). Introduce yourself and the position you're applying for, describe your background, and explain why you think you're a good candidate for the job. Make up any details you need. If your instructor asks you to do so, record the podcast and submit the file.

PODCASTING SKILLS/PORTFOLIO BUILDER

7-38. Media Skills: Podcasting; Message Strategies: Marketing and Sales Messages [LO-5], Chapter 12 With any purchase decision, from a restaurant meal to a college education, recommendations from satisfied customers are often the strongest promotional messages.

Your task: Write a script for a one- to two-minute podcast (roughly 150–250 words), explaining why your college or university is a good place to get an education. Your audience is high school juniors and seniors. You can choose to craft a general message—something that would be useful to all prospective students—or you can focus on a specific academic discipline, the athletic program, or some other important aspect of your college experience. Either way, make sure your introductory comments make it clear whether you are offering a general recommendation or a specific recommendation. If your instructor asks you to do so, record the podcast and submit the file.

Five-Minute Guide to Better Business Email

Whenever you sit down to write an important email message, spend five minutes previewing the task to make sure you're ready to get started. Then you can use this guide to work your way through each step of the process.

00:01

Plan the message

1. Make sure email is the best medium/channel option.
2. Analyze the situation: Who is your audience, and what is your purpose?
3. Identify the information you'll need to accomplish your purpose.
4. Choose the direct or indirect approach. Can you open with the main idea, or do you need to build up to it indirectly?

00:02

Draft the message

1. Unless you are sending short and simple messages to close colleagues, write in a conversational but professional style, with complete sentences and standard punctuation and capitalization.
2. Make your content easy to skim and easy to read by using short paragraphs.
3. Use bulleted or numbered lists to break out items, steps, or other entities.
4. Clarify how you would like the recipient to respond; don't assume the reader will know what you expect.

00:03

Craft a compelling subject line

1. For routine communication with audiences who know you and expect to hear from you, a clear and concise description of the message's purpose and content is often sufficient.
2. If the recipient might ignore your message or delay opening it, you need to get creative:
   - Put yourself in the reader's shoes: Why would *you* want to open this message?
   - Relate the content and purpose of the message to the reader's top-of-mind concerns.
   - If action is needed soon, indicate this in the subject line.
   - Look for ways to add a sense of intrigue or mystery (without being obscure), such as "New budget numbers—make sure you're sitting down."
3. Revise the subject line if an ongoing thread has shifted the focus of the conversation.

00:04

Finalize and format the message for fast, easy reading

1. Revise to make the message clear and concise.
2. Proofread carefully—it could save you hours of headaches and damage control.
3. Double-check dates, budgets, names, and other important variables.
4. Use a simple, clean layout with an easily readable font.
5. Use an email signature so people have your full contact information.

00:05

Distribute the message

1. Include only those recipients who really need to see the message.
2. Use cc to include secondary recipients.
3. Use bcc to protect the identity of recipients, such as when you don't want to reveal their email addresses to others on the distribution list.
4. If the conversation evolves over the course of a thread and is no longer relevant to everyone who was originally included, remove them from the distribution.
5. Don't mark messages as "urgent" or "important" unless they truly are.

Endnotes

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8 Social Media

LEARNING OBJECTIVES

After studying this chapter, you will be able to

1. Discuss six common uses of social media for business communication.
2. Explain how to develop a social media strategy and social media content.
3. List the most common types of social networks used in business and four content strategies for social networking.
4. Discuss the role of blogging in business, and offer tips for successful blogging.
5. Describe the business uses of Twitter and other microblogging systems, and offer tips for writing effective business tweets.
6. Identify four considerations when setting up a business wiki, and explain how to become a valuable wiki contributor.



Rawpixel.com/Shutterstock

Recognizing that the traditional, top-down approach to communication stifled employee input, ExterionMedia implemented an internal social media solution that empowered employees to share ideas, success stories, and other valuable content. Such systems promote the spontaneous interaction and information sharing that open-plan offices such as this one enable, even if employees are spread out around the country or the world.

COMMUNICATION CLOSE-UP AT ExterionMedia

www.exterionmedia.com/fr

As one of the largest outdoor advertising companies in Europe, ExterionMedia is in the business of helping other companies communicate. For all its success helping clients put their messages on billboards, buses, and other high-visibility places, however, the company's French subsidiary recently realized that its own internal communications could stand some improvement.

ExterionMedia has been in business for more than a century, so it wasn't too surprising that it had a traditional, top-down approach to communication. Information flowed from executives down through the ranks, and employees had relatively little input. As social media and the social communication model began to revolutionize business communication, though, company president Jean-François Curtil and human resources director Olivier Cagnac saw an opportunity to apply this model inside the organization.

Curtil and Cagnac implemented an internal social network from Sociabble that functions much like the public social networks that most employees were already comfortable using. The network uses several powerful tools, including *user-generated content (UGC)*, where employees can contribute photos, video, and other media to the company's content pool. It also uses *gamification*, applying the competitive, scorekeeping tactics of game playing to encourage employees to contribute information and ideas.

In addition, the Sociabble platform has the capability to turn employees into ambassadors for the company by linking the company's official information channels to their personal social media accounts. This next step in Curtil and Cagnac's cultural transformation, known as *employee advocacy*, will make it easy for employees to share information about working at ExterionMedia and other work-related topics using preapproved content that protects the integrity of the company's external messaging.

Curtil and Cagnac view the new social platform as a solid success. Employee engagement and contribution are way up, with nearly every employee active on the system. The new approach has multiplied the amount of information shared across the company by a factor of five, and 80 percent of the information in the system is now contributed by employees. In addition, the new system has completely replaced email for internal communication.

Social media tools have proved themselves ideal for many external business communication tasks, but as ExterionMedia and many other companies are discovering, the benefits of connecting and sharing are just as powerful inside companies, too.[1]



How Businesses Use Social Media for Internal and External Communication

1 LEARNING OBJECTIVE
Discuss six common uses of social media for business communication.

This chapter continues the discussion of media skills, with a look at business applications of social media for both internal and external communication. The chapter starts with an overview of how companies use social media for business communication and a discussion of social media strategies and tactics and follows that with specific skills for social networking, blogging, microblogging, and wiki writing. In addition to the coverage in this chapter, you'll find related social media topics in several other chapters, such as rejecting reference requests on social media (page 326), responding to negative information and rumors online (page 324), and writing persuasive messages for social media (page 358).

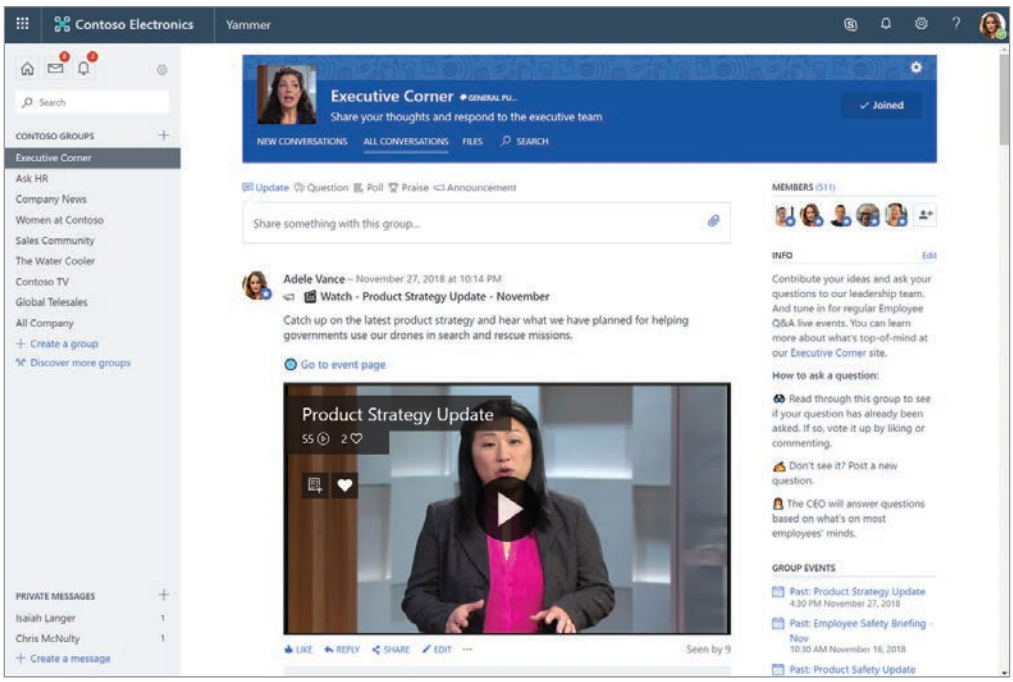
Many companies now use social media for internal communication in addition to the more visible uses in external communication.

If you are active on social media, you have no doubt noticed that many companies use these systems to promote their products and services and to communicate with local communities, potential employees, and other external stakeholders. However, as ExterionMedia showed in the chapter-opening Communication Close-Up, many businesses now rely on social media for internal communication as well. In the same way that public social networks bring together people with similar interests, internal social platforms, such as Microsoft's Yammer (see Figure 8.1) and Facebook's Workplace, can do the same for the employees of an organization. These systems, sometimes referred to as *enterprise social networks*, typically combine elements of social networking, online meetings, knowledge-management systems, blogging, and *microblogging* or *enterprise micromessaging* (functions similar to Twitter).

Internal social networks can help companies grow closer, jell after reorganizations or mergers, and overcome structural barriers in communication channels.

With their key benefits of helping people share information and forging mutually beneficial relationships, social networks and other social platforms are a great fit for many business communication needs. Here are six examples of how companies use social media for internal and external business communication:

- **Integrating and expanding company workforces.** Just as public networks can bring friends and families together, internal social networks can help companies grow closer, including helping new employees navigate their way through the organization by finding experts, mentors, and other important contacts; encouraging workforces to jell after reorganizations or mergers; and overcoming structural barriers in communication channels by bypassing the formal communication system to deliver information where it is needed in a timely fashion. Social networking is also fueling the growth of *networked organizations*, sometimes known as *virtual organizations*, where companies supplement the talents of their employees with services from one or more external partners, such as a design lab, a manufacturing firm, or a sales and distribution company.
- **Fostering collaboration.** Social networks and other systems with a strong social component can play a major role in collaboration by identifying the best people, both inside the company and at other companies, to collaborate on projects; finding pockets of knowledge and expertise within the organization; giving meeting or seminar participants a way to meet before an event takes place and to maintain relationships after events; accelerating the development of teams by helping team members get to know one another and identify individual areas of expertise; and sharing information throughout the organization.
- **Building communities.** Social platforms are a natural tool for bringing together *communities of practice*, people who engage in similar work, and *communities of interest*, people who share enthusiasm for a product or activity. Large and geographically dispersed companies can benefit greatly from communities of practice that connect



Screenshot of Microsoft Office 365, ©Microsoft Corporation

Figure 8.1 Internal Social Networking
Many companies now use internal social networking platforms, such as Microsoft's Yammer, to encourage collaboration and communication across their workforces. These platforms use the same concepts you are familiar with from your personal social networking experiences, but most also include additional features for security and collaboration.

experts who may work in different divisions or different countries. Communities of interest that form around a specific product are sometimes called **brand communities**, and nurturing these communities can be a vital business communication task. Some communities spring up spontaneously when product enthusiasts connect online, whereas others are more formal organizations established by companies to help customers use their products more successfully and engage with like-minded individuals. The SAP Community Network, for instance, set up by the enterprise software company SAP, has nearly 3 million members (including many college students) who have posted more than 100,000 blog articles and answered 150,000 questions from other members.[2]

Brand communities are groups of people with interests in specific products.

- **Socializing brands and companies. Brand socialization** is a measure of how effectively a company engages with its various online stakeholders in a mutually beneficial exchange of information. In today's networked world, socialization is often as important as product quality and customer experience in establishing and maintaining a company's reputation.[3]

Brand socialization is a measure of how effectively a company engages with its various online stakeholders in a mutually beneficial exchange of information.

- **Supporting customers.** Customer service is another fundamental area of business communication that has been revolutionized by social media. *Social customer service* involves using social networks and other social media tools to give customers a more convenient way to get help from the company and to help each other.
- **Understanding target markets.** With hundreds of millions of people expressing themselves on social media, smart companies are listening. This listening often takes place automatically with *text analytics* systems (see "Intelligent Communication Technology: Monitoring the Social Media Sphere with Smart Listening Tools" on page 222).

Table 8.1 on page 220 summarizes these and other common applications of social media for internal and external communication, categorized by the three essential aspects of business communication discussed in Chapter 1.

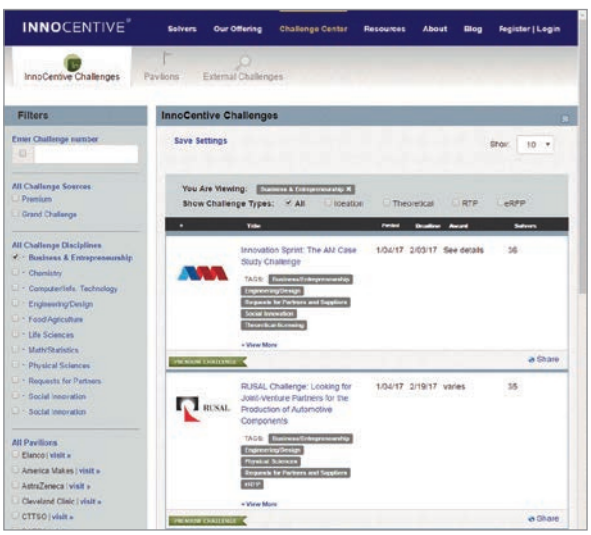
"Business Communicators Innovating with Social Media" starting on the next page offers a variety of examples of companies using social media to foster better communication among their stakeholder communities.

(*continued on page 220*)

BUSINESS COMMUNICATORS INNOVATING WITH SOCIAL MEDIA

Companies in virtually every industry use social media and continue to experiment with new ways to connect with customers and other stakeholders. From offering helpful tips on using products to helping customers meet each other, these companies show the enormous range of possibilities that new media continue to bring to business communication.

Crowdsourcing and collaboration platforms invite input from groups of people inside or outside the organization and can give companies access to a much wider range of ideas, solutions to problems, and insights into market trends.



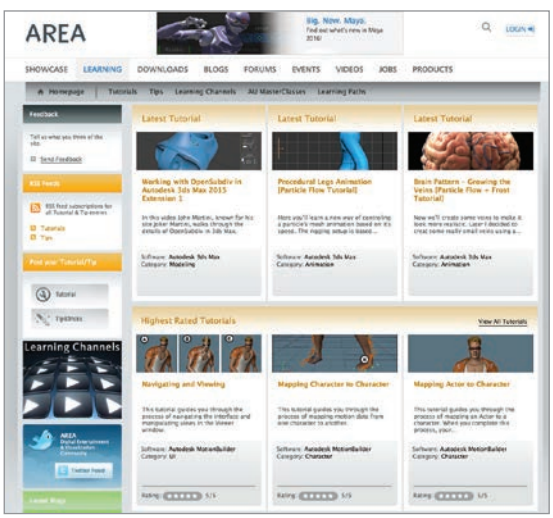
InnoCentive, Inc.

User-generated content (UGC) sites and campaigns are a great way to foster a sense of community among customers and enthusiasts. UGC can be hosted permanently on websites such as YouTube or Flickr or generated as part of a one-time program, such as this Twitter campaign by the yogurt company Chobani.



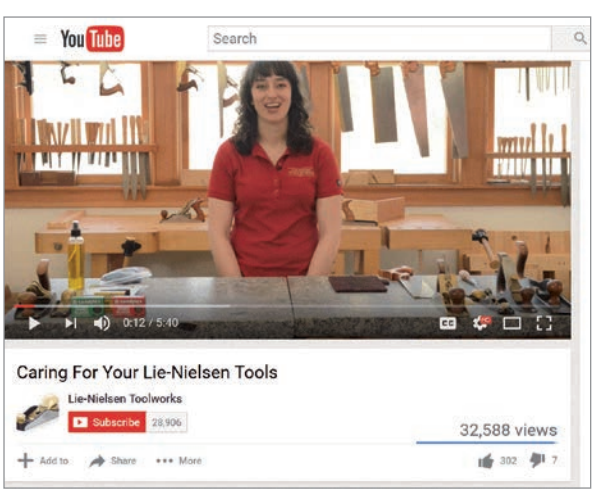
Twitter screenshot of Chobani.

Community Q&A sites let customers, product enthusiasts, and other groups help one another by answering questions and posting advice. Many companies now rely heavily on communities of customers to help each other with product questions and other routine matters.



Area - Autodesk

Social video, often organized in branded channels, has become particularly important in customer communication, but businesses also use it for employee recruiting, technical support, training, community outreach, and other purposes. As social networking continues to expand, much of the content shared through online communities is shifting from text-dominant messages to video.



YouTube, LLC.

Enterprise social networks are closed digital communities that connect employees within a company (and in some cases, selected external business partners). They often include a variety of communication and collaboration tools as well, including workgroup messaging, online meeting functions, and access to work files and other shared resources.

If you are an active user of social media, you will probably find it easy to adapt to these enterprise networking platforms. However, be prepared for stricter standards of privacy and information security, including restrictions on the types of information that can be shared.



Monkey Business Images/Shutterstock

Social media recruiting specialists take advantage of social platforms to post job openings, share news about their companies, and conduct background research on candidates.



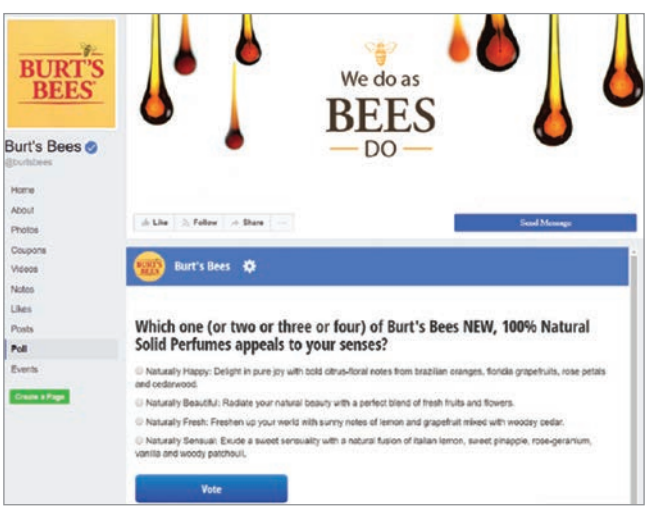
©Hyatt.

Content curation, selecting videos and other items of interest to followers of a website or blog, has become one of the most popular ways to connect with stakeholders. Pinterest and Scoop.it are among the leading platforms in this area.



Pearson

Community engagement activities such as surveys, contests, and discussion-starter questions can be a great use of Facebook and other social media services.



Burts Bees

TABLE 8.1 Common Business Communication Uses of Social Media

Operations	Intelligence	Relationships
Fostering collaboration. Networks can help identify the best people to collaborate on projects and find pockets of knowledge and expertise within the organization.	**Understanding target markets.** Many companies monitor and analyze social media traffic to pick up on consumer trends, complaints, rumors, and other bits of environmental intelligence.	**Onboarding new employees.** Internal networks can help new employees navigate their way through the organization and find experts, mentors, and other important contacts.
Recruiting employees and business partners. Companies use social networks to find potential employees, short-term contractors, subject-matter experts, product and service suppliers, and business partners. A key advantage here is that these introductions are often made via trusted connections in a professional network.	**Monitoring company and brand reputations.** Tools for sentiment analysis and reputation analysis assess the reputations of companies and individuals, measure the emotional quality of online conversations, and identify outrage "hot spots" on social media.	**Integrating company workforces.** Internal social networks can help companies grow closer, including encouraging workforces to "gel" after reorganizations or mergers and overcoming structural barriers in communication channels.
Promoting products. If done in a way that doesn't annoy followers, social media can be an effective way to promote a company and its brands.	**Identifying opinion influencers.** Social media influencers can sway public opinion, so companies try to identify opinion leaders in their markets.	**Accelerating team development.** Networks can help members get to know one another, identify individual areas of expertise, and share resources.
Supporting customers. Social customer service involves using social media to give customers a more convenient way to get help from the company and to help each other.	**Supplementing the formal communication network.** Internal social networks can bypass the formal communication system to collect and distribute information in a timelier fashion.	**Extending professional networking.** Social media can give seminar and conference participants a way to meet before an event and to maintain relationships afterward.
Extending the organization. Social networking is also fueling the growth of networked or virtual organizations, where companies supplement the talents of their employees with services from one or more external partners, such as a design lab, a manufacturing firm, or a sales and distribution company.	**Finding sales prospects.** Salespeople on networks such as LinkedIn can use their connections to identify potential buyers and ask for introductions through those shared connections. Sales networking can reduce *cold calling*, contacting potential customers without a prior introduction.	**Building communities.** Social networks can bring together communities of practice, people who engage in similar work, and communities of interest (sometimes called brand communities), people who share enthusiasm for a product or activity.
Communicating during a crisis. When companies need to communicate with broad audiences in a hurry, social media are ideal channels.		**Employee advocacy.** Companies can amplify their voices by using employees' social media connections to share approved messages.

Sources: Based in part on Lexalytics website, accessed 12 February 2019, www.lexalytics.com; Evolve24 website, accessed 12 February 2019, www.evolve24.com; Matt Charney, "How to Use Social Media for Employee Onboarding," *Recruiting Daily*, 27 April 2015, recruitingdaily.com; Shep Hyken, "Social Customer Care Is the New Marketing," *Forbes*, 22 April 2017, www.forbes.com.

Strategies and Tactics for Successful Social Media Use

2 LEARNING OBJECTIVE
Explain how to develop a social media strategy and social media content.

Given how easy it is to set up social media accounts, it can be tempting to create accounts on the major services and start firing away with messages. However, to maximize effectiveness and minimize problems, a clear strategy is essential.

ESTABLISHING A SOCIAL MEDIA STRATEGY

A good social media strategy answers six key questions:

- Why are we using social media?
- Who is our audience, and who will create the content?
- What types of messages will we share?
- How will we create content?
- Where will we distribute our content?
- When will we post new material, and how quickly do we need to respond to messages?

A good social media strategy answers six questions, which can be summarized as *why, who, what, how, where*, and *when* (see Figure 8.2):

Why: Setting Social Media Goals

Success starts with understanding why a company wants to use social media. Social media efforts should be integrated with the firm's other marketing, customer support, and community outreach activities, and they should be undertaken with specific, measurable goals in mind. Social media professionals use a wide variety of *metrics* to set goals, measure success, and adjust tactics as needed. For example, *conversion rate* measures how many people take a desired action (such as clicking or tapping through to a website) after seeing a tweet, video, or other message.[4]

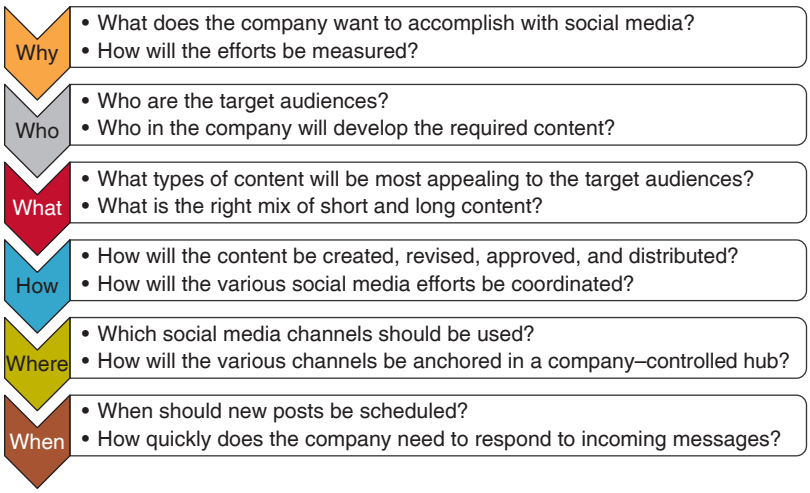


Figure 8.2 Social Media Strategy
Answering these six sets of questions will help a company develop a productive and efficient social media strategy.

Who: Identifying Target Audiences and Content Developers

With goals to guide the social media effort, the next step involves people—who are the target audiences and who inside the company will create all the content that is required. Making sure the social media program is adequately staffed can be a challenge. New programs often start off with a burst of enthusiasm and ideas, but sustaining a social media effort takes commitment and support from company management.

What: Choosing Message Strategies and Content Types

With a target audience and content developers lined up, the next step is laying out message strategies and identifying the specific types of content that will be most effective. One common approach is the "social media rule of thirds," where you divide your social media activities equally among (a) content that promotes your business directly or indirectly, (b) content shared from other sources, and (c) interaction with your audiences.[5]

In general, today's audiences prefer brief messages that are directly relevant to their interests and easy to consume, so lists, infographics, short videos, and similar "bite-sized" content is popular. However, in some situations, audiences may prefer longer messages and documents, such as product application guides or technical backgrounders. Social media can be a great way to announce and distribute these long-format materials.

One of the most appealing benefits of social media is the opportunity for experimentation. Social media teams can test two versions of a message (known as *A/B testing*); for example, they can compare response levels at various times of the day or days of the week and compare the appeal of a message distributed through more than one channel. With response data in hand, they can quickly adjust message content and strategies for maximum impact.

The *social media rule of thirds* divides your time equally among
- Content that promotes your business directly or indirectly
- Content shared from other sources
- Interaction with your audiences

Today's audiences prefer brief messages that are directly relevant to their interests and easy to consume.

How: Figuring Out How to Create and Distribute Content

Social media engagement can become a major workload challenge, so managers need to figure how content will be created, revised, approved, and distributed. A large corporation may have dozens or even hundreds of social media channels and dozens of people on its social media teams, and all these efforts need to be coordinated.

Where: Choose Social Media Channels and Connections

This step involves identifying which channels the company should use and how they should be connected. Companies frequently designate social channels for specific types of communication. The makeup company Benefit Cosmetics, for example, emphasizes customer service on its Twitter account while using Snapchat and Instagram for tutorial videos.[6]

The multiple threads of any social media program should be anchored in a central *hub* that the company owns and controls rather than relying on a third-party system,

MOBILE APP
The social media management app **Social Oomph** lets you monitor multiple social media sites, schedule updates, and perform other time-saving tasks.

such as Facebook. A company's own website makes an ideal social media hub. The firm can use its social media accounts to connect with stakeholders and draw them into the website, which can have whatever marketing, sales, and support functions are needed.

Employee advocacy in social media involves encouraging employees to share company-approved content via their personal social media accounts.

To extend the reach of their communication efforts, firms can use *employee advocacy* systems, such as Hootsuite Amplify and Sociabble (see the ExterionMedia story at the beginning of the chapter). With these services, employees can connect their company's official content channels to their own personal social media accounts. These connections then make it easy for employees to share approved messages and media content with their own followers.[7]

When: Scheduling Posts and Ensuring Rapid Responses to Incoming Messages

MOBILE APP
Schedule posts and analyze social media performance with the **Buffer** app.

Finally, companies often establish schedules for posts to ensure a regular flow of information, to help employees manage their workloads, and to avoid overwhelming audiences with too many messages at once. Through testing, firms can identify the best days and times to distribute various types of messages. In addition, specific message campaigns might be scheduled to coincide with public holidays, major sporting events, or new product launches. A variety of tools are available to preschedule posts for publication on desired dates.

Firms also need to make sure they have staff available to respond to social media messages and a clear set of processes for doing so. Many customers now post complaints, questions, and requests for help on social media, and their frustrations will only grow if no one responds.[8]

DEVELOPING SOCIAL MEDIA CONTENT

As Chapter 1 points out, social media have changed the relationship between sender and receiver, so the nature of the messages needs to change as well. Consider these tips at each step of the three-step writing process.

INTELLIGENT COMMUNICATION TECHNOLOGY

Monitoring the Social Media Sphere with Smart Listening Tools

Every day on Twitter, Facebook, and other social media platforms, millions of consumers and business customers rant, rave, brainstorm, offer help, and ask for help. Smart companies recognize that this global chatter is a gold mine of valuable insights, and they use *social listening* tools to figure out what people are saying about them and their competitors.

Companies listen to social media traffic in various ways, including following *hashtags* (terms preceded by the # character) and monitoring keywords, such as the company's name, the names of its products, competitors' names, and any terms that might suggest relevant conversations. These tools can often detect when a social media user is talking about the company, even if the company and brand names aren't used or the company isn't tagged directly.

Today's smart listening tools take this mass of data and use artificial intelligence to analyze the conversations in which these terms appear. By using text analytics (see page 385), the systems judge whether conversations are trending strongly negative, strongly positive, or somewhere in between.

Companies can then use these sentiment readings in a variety of ways, including responding to individual requests for help, gathering ideas for new products or new product features, and generating ideas for social media content. For example, if a company detects a surge of complaints that one of its products is difficult to use, it can reach out to individual users with advice, begin improving the design of the product based on this feedback, or perhaps create a video or other media elements with advice to help people use the product more successfully. By jumping on the situation quickly, the company might be able to contain the dissatisfaction and avoid a public relations headache.

Firms can capitalize on positive sentiments, too. For instance, a food company could monitor for discussions of where and when people enjoy particular snacks, such as while camping or on road trips. It might then launch its own hashtag campaign with #CampSnacks or something similar to tap into these positive vibes.

With consumers increasingly relying on social media for purchasing advice and customer support, social listening tools are becoming vital for any company that wants to protect its reputation and jump on emerging opportunities.

WHAT'S YOUR TAKE?

1. Have you ever complained about a company's products or services on social media? If so, did you get a response from the company or from anyone else? How would you characterize social media's usefulness in resolving customer satisfaction problems?
2. Is it ethical for a company to "eavesdrop" on social media conversations? Why or why not?

Sources: Christina Newberry, "What Is Social Listening, Why It Matters, and 10 Tools to Make It Easier," Hootsuite blog, 27 November 2018, blog.hootsuite.com; Dominique Jackson, "What Is Social Listening & Why Is It Important?" Sprout Social, 20 September 2017, sproutsocial.com; Patrick Whatman, "A Beginner's Guide to Social Listening," Mention blog, mention.com.

Planning Social Media Content

The planning step for social media content considers all the tasks you learned in Chapter 4 along with some special considerations for the social component of this communication format.

Take a Conversational Approach One of the great appeals of social media is the feeling of conversation, of people talking *with* one another instead of one person talking *at* everyone else. For all their technological sophistication, a key aspect of social media is providing a new spin on the age-old practice of *word-of-mouth* communication. As more people gain a voice in the marketplace, companies that maintain the old "we talk, you listen" mindset are likely to be ignored in the social media landscape. People generally join social networks for the chance to interact, and you can help stimulate conversations by asking followers for their ideas, opinions, and feedback.[9]

Readers of social media expect to have a more engaged relationship with writers, so creating content for social media requires a new approach to writing.

Support the Ways Your Readers Want to Consume Information One major reason for the explosion of digital, social, and mobile media options in recent years is that no single approach works best for all readers. Some are comfortable reading long articles and documents, whereas others prefer brief summaries, videos, podcasts, or other formats. Many people engage in "content snacking," consuming small pieces of information, often from multiple sources in rapid succession, and bypassing larger documents that might require more than a few minutes or even a few seconds to read.[10]

To reach all your target readers, you might need to change how you organize and distribute messages. For instance, rather than writing a single, long report on a complicated topic, you might want to write a teaser on Twitter that links through to an orientation or summary on your blog, which then offers a download of the full report or links to reference information on a website.

To meet the needs of all your audience members, you may need to create and distribute a variety of messages through multiple channels.

Provide Information That Your Connections Are Likely to Share One of the biggest benefits of social media is the "message boost" you can get from encouraging people who follow you to share your content with people who follow them. Particularly on public networks, when you're deciding what to post, emphasize material that your followers will think is valuable enough to pass along.[11]

A key benefit of social media is the "message boost" you can get from having your followers share your content with the people who follow them.

Restrict Promotional Efforts to the Right Time and Place Some companies use selected social media accounts for product promotion, but efforts to inject blatant "salespeak" into social networking conversations may not always be welcomed by the audience. See "Writing Promotional Messages for Social Media" in Chapter 12 for more tips on writing messages for social networks and other social media.

Promote a Sense of Community Make it easy for customers and other audiences to connect with your company and with each other. For instance, you can use the group features on Facebook, LinkedIn, and other social networks to create and foster special-interest communities within your networks. Groups are a great way to connect people who are interested in specific topics, such as owners of a particular product.

Be Transparent Chapter 1 defines transparency as a sense of openness and of giving recipients the information they need to process messages accurately. Laws in the United States and other countries require certain aspects of transparency, such as requiring that social media users disclose any financial incentives they have when promoting or reviewing products. These laws don't explicitly address every conceivable scenario, but the U.S. Federal Trade Commission outlines a variety of examples in which social media users would be required to disclose a beneficial relationship.[12] As with all ethical questions, of course, companies should look beyond the letter of law and make choices that reflect ethical decision-making.

Writing Social Media Content

All the tasks in the writing step of the three-step writing process apply to social media, but here are several particular points to keep in mind.

Choose the Best Compositional Mode for Each Message and Social Media Service As you visit various social networks, study the types of messages that other companies post. For

Choose the best compositional mode for each message and social platform.

example, Facebook allows posts up to 63,206 characters (roughly the length of this chapter), but few people have the patience to read a Facebook post that long. If your goal is to maximize audience interaction, the ideal length of a post is *much* shorter—only 40 to 80 characters.[13] Consequently, while technically you can use Facebook for in-depth tutorials and reference information, it is most effective for brief messages, such as teasers and status updates.

In addition, keep on top of changes in system capability and audience expectations. Twitter, for instance, began as a social text-messaging service, but with support for photos and videos it has become a true multimedia application. In fact, Twitter has become such a visual channel that it can at times look an awful lot like Facebook and other platforms.

For all your social media efforts, write casually and conversationally—but not carelessly.

Write Informally but Not Carelessly Write as an individual with a unique, personal voice. However, don't take this as a license to get sloppy; no one wants to slog through misspelled words and half-baked sentences to find your message. And remember that your posts may be shared and seen far beyond the people you consider your primary audience.

In addition, pay careful attention to your tone. As Chapter 5 points out, your tone is the effect you create through the choices you make as a writer. You can convey the same information in a tone that is assertive or mild, upbeat or negative, friendly or distant—all based on your word choices and sentence style. Don't let the informal vibe of social media tempt you into being careless or crude, and don't let emotions get the better of you. Remember that even though it's "social," it's still business communication.

Write Concise, Specific, and Informative Headlines In an environment of content snacking and information overload, headlines (or post titles, as some systems call them) are extremely important in social media. You need to grab readers quickly with the promise that you have something of value to offer.

Readers—and search engines—don't like spending time trying to figure out clever puns and other wordplay; make your headlines clear and direct.

Avoid the temptation to engage in clever wordplay when writing headlines and teasers. Readers don't want to spend time figuring out what your witty headlines mean. Search engines won't know what they mean either, so fewer people will find your content. Headline space is precious real estate, so focus these words on the tangible benefits that each post offers your readers.[14]

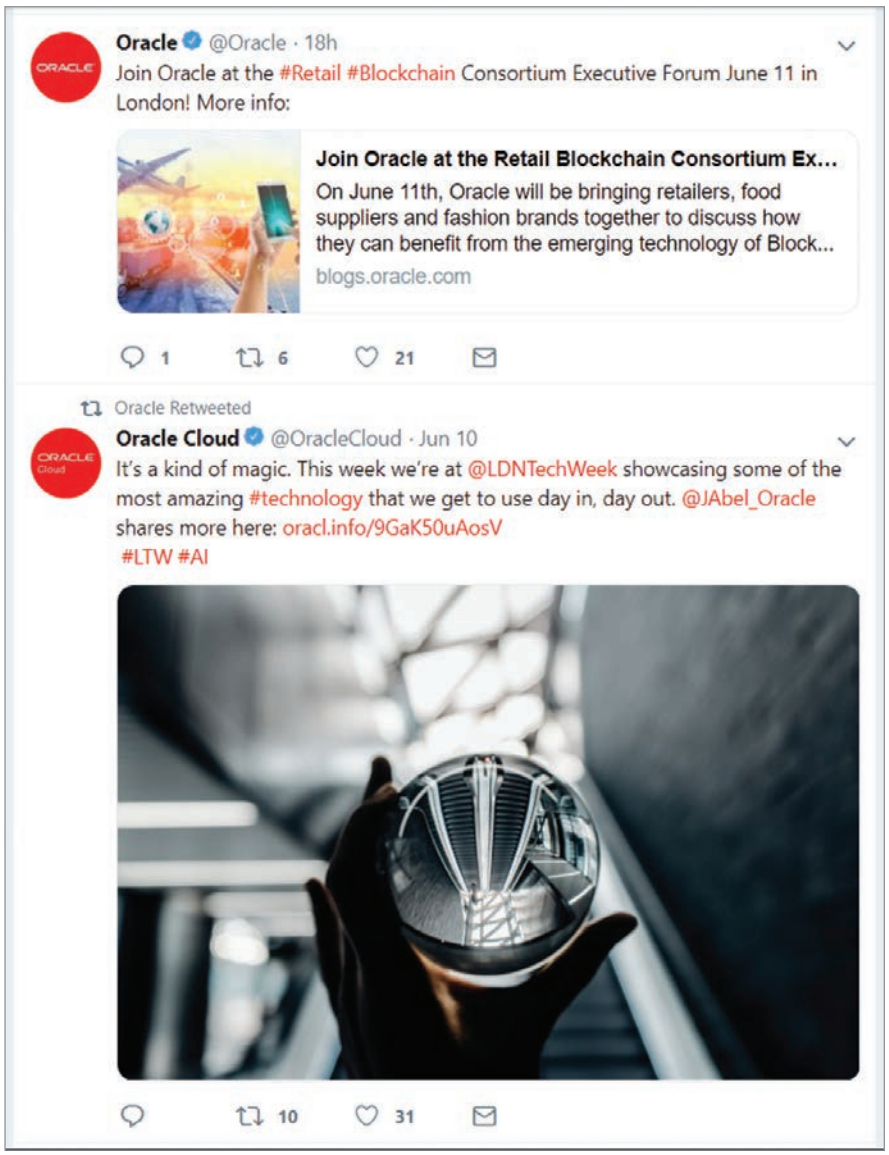
Look for Opportunities to Include Visual Content As Chapter 9 explains, business communication is increasingly a visual affair, and this is definitely reflected in social media. Snapchat, Instagram, and Pinterest are visual services by design, and Facebook and Twitter have become de facto visual services to a large degree. Whenever it is relevant and will help the audience embrace your message, look for ways to include visual support, even if your message is primarily verbal. Even something as simple as including *stock photos* (images available for use by the public) next to the titles of social media posts can increase readership (see Figure 8.3).

You can find free images through Creative Commons (**creativecommons.org**), but be sure to follow the licensing terms for each image. For many of these images, all you are required to do is credit the photographer or artist, but it's good practice to provide a link back to the creator's page on Creative Commons or elsewhere as a way of saying thanks.

Completing Social Media Content

The completing step is usually quick and easy with social media platforms. In most cases, either you will have little control over the output format, or the system will let you choose templates that make all the major formatting decisions once you have them in place. However, don't rush to hit "Publish" the second you finish typing. To protect your personal brand and your company's brand, review your posts for quality before you publish them.

Review for Quality The amount of quality control that is appropriate for each message depends on the situation and context. For internal messages to close colleagues, a quick proofreading pass to make sure the message is clear and free from errors is usually sufficient. However, keep in mind that your company's internal social network probably archives all messages and may make them searchable by any authorized user, so don't let casual communication become careless.



Harvard Business School Publishing

Figure 8.3 Visual Elements in Social Media Posts
Including eye-catching visuals with social media posts can increase visitor engagement.

For external messages, quality control is a must. Follow the revising and proofreading tips in Chapter 6, and consider how each message might be interpreted not only by the target audience but by the news media, investors, and the general public.

Quality control is critical for external social messages; they may be seen by people far beyond your target audience.

Look for Opportunities to Improve Readability Chapter 6 also has advice for improving readability, although you won't always have the flexibility to make all the design choices you might like to make. Regardless of how much or how little design flexibility you have on a given social media platform, here are three steps you can always take to help mobile readers:

- Break up long paragraphs so that readers can consume the content in shorter "gulps."
- Add headings and subheadings to promote rapid skimming and to help readers avoid getting lost as they swipe through the material.
- Keep headlines and titles as short as possible.

Think Before You Post Careless decisions on social media can have damaging consequences to companies, careers, relationships, and reputations. Remember that you share the responsibility of keeping your company's and your customers' data private and secure. Assume that every message you send in any digital medium will be stored forever and might

Careless decisions on social media can have damaging consequences to companies, careers, relationships, and reputations.

be read by people far beyond your original audience. Ask yourself two questions: "Would I say this to my audience face-to-face?" and "Am I comfortable with this message becoming a permanent part of my personal and professional communication history?"

In addition to this general advice for developing social media content, adapt your communication efforts to take advantage of each platform's key strengths (see Table 8.2).

TABLE 8.2 Tips for Successful Communication on Major Social Media Platforms

Platform	Tips for Success
Facebook	Make sure the profile and cover images on your Facebook business page create the impression you want to communicate; remember that the profile image will appear with every update you post.
	Use the About section to tell followers about your business and how to contact you.
	Keep posts short.
	Include eye-catching, relevant visuals to increase reader response.
	Host Facebook Live video sessions to interact with followers.
	Use Facebook Groups to build community.
	Invite user-generated content, such as photos and videos.
	Respond to user comments, whether they are positive or negative.
Twitter	Make sure your header and profile images create the impression you want to communicate; remember that the profile image will appear with every tweet you post.
	Choose a user name (also known as a *Twitter handle*) that is as close as possible to your company name or the specific function you plan for this account, such as @Mycompany or @MycompanySupport.
	Use your Twitter bio to convey a benefit that will appeal to target readers.
	Select a *pinned tweet* (which always appears at the top of your Twitter page) with a message of compelling interest to your followers.
	Include relevant visuals to increase reader response.
	Interact with your followers and other Twitter users.
Instagram	Create a business profile to take advantage of additional communication options.
	Use your profile to maintain a fresh message, updating it to reflect new products, new events, and so on.
	Use Instagram's visual focus to convey your company's personality and customer benefits, including photos of products in action, employees on the job, and customer successes.
	Create Instagram Stories (photo slideshows) to provide product usage tips and other valuable information.
	Use hashtags generously to ensure a wider audience for your posts.
Pinterest	Bear in mind that although Pinterest is used by many as a shopping site, it has wider potential for business communication.
	Create *boards* based on topics that will interest your stakeholders.
	Fill boards with individual *pins*, which can link to anything from photos and videos to blog posts and case studies.
	Offer a mix of attention-grabbing visuals (including infographics) and practical how-to advice.
	Supplement your pinned visuals with brief descriptive text that lets people know what to expect when they click.
YouTube	Explore the full range of ways you can use video to communicate with stakeholders, from product training to employee recruiting.
	Offer information that is difficult to find elsewhere or difficult to consume in other formats (such as a video demonstration that lets people avoid the work of reading pages of technical information).
	Invest in a good digital camera, a quality microphone, and sufficient lighting to ensure a professional level of production quality.
	Don't overwhelm the spoken information with background music.
	While you don't necessarily need to script each video in fine detail, do enough planning to ensure a smooth, time-efficient performance; viewers don't have the patience to sit through slow, rambling videos.

Sources: Christina Newberry, "The Definitive Facebook Marketing Guide for Business," Hootsuite, 22 March 2018, blog.hootsuite.com; Tom J. Law, "The Ultimate Guide to Using Twitter for Business Success in 2018," Oberlo, 7 September 2018, www.oberlo.com; Veronika Baranovska, "7 Tips for Using Instagram for Business, Sendible, 15 January 2019, www.sendible.com; Christina Newberry, "How to Use Pinterest for Business: 8 Strategies You Need to Know," Hootsuite, 6 November 2018, blog.hootsuite.com; Brent Barnhart, "10 Super Productive Ways to Use Pinterest for Business," SproutSocial, 26 November 2018, sproutsocial.com.

MANAGING THE ORGANIZATIONAL CHALLENGES OF SOCIAL MEDIA

For all their benefits, social media present managers with a variety of challenges that require thoughtful planning and clear policies to guide employee use of these tools.

With internal social platforms, a key challenge can be getting employees to use the tools. For instance, if a company launches a new internal social network or workgroup messaging system meant to replace email, management may need to find ways to encourage people to use it. This effort can involve creating incentives with gamification (such as awarding recognition points for content contributions), shutting down alternative channels, and making sure that company leaders are visible users of the new system.

With all types of social media, companies need a balance of sound policies and responsible employee behavior. Common issues include:

- Making sure employees aren't overloaded with social media tasks, such as being expected to develop content or respond to incoming messages while carrying a full load of other tasks
- Discouraging employees from spending too much unproductive time on social media
- Preventing employees from sharing inappropriate materials or confidential information
- Making sure the company has a cohesive voice in social media, where the messages going out on various channels don't contradict one another
- Discouraging the emergence of private groups or channels that use internal social networks specifically to exclude some employees

Managers need to make sure employees have enough time to fulfill their social media duties.

"Checklist: Social Media Strategies and Tactics" summarizes the key points from this section.

CHECKLIST ✓ Social Media Strategies and Tactics

A. Establishing a social media strategy: six questions to ask
- Why do you want to use social media?
- Who are your target audiences, and who will create the content?
- What types of messages will you share?
- How will the content be created and distributed?
- Where will you distribute your content (which social media channels and networks)?
- When will you post content, and how quickly do you need to respond to incoming messages?

B. Planning social media content: key points to remember
- Take a conversational approach.
- Support the ways your readers want to consume information.
- Provide information that your connections are likely to share.
- Restrict promotional efforts to the right time and place.
- Promote a sense of community.
- Be transparent.

C. Writing social media content: key points to remember
- Choose the best compositional mode for each message and social media service.
- Write informally but not carelessly.
- Write concise, specific, and informative headlines.
- Look for opportunities to include visual content.

D. Completing social media content: key points to remember
- Review for quality.
- Look for opportunities to improve readability.
- Think before you post.

Social Networking for Business Communication

Social networks, online services that enable individual and organizational members to form connections and share information, and content-sharing platforms that have a significant social component are a major force in business communication. To varying degrees, businesses use social networking platforms for all the communication activities listed in Table 8.1. In addition, systems such as Slack and other workgroup messaging services have aspects of social networking. The advice in this section applies to any networks your current and future employers will expect you to use.

3 LEARNING OBJECTIVE
List the most common types of social networks used in business and four content strategies for social networking.

CATEGORIES OF SOCIAL NETWORKING PLATFORMS

Social communication platforms include several types of social networks plus content sharing services with a significant social component.

The social networking platforms that businesses and individual professionals use can be grouped into six categories:

- **Public, general-purpose social networks.** Facebook is the largest and best known of these networks. Companies can use Facebook for marketing and customer communication in a variety of ways, from posting helpful product usage information to addressing complaints and questions.
- **Public, specialized social networks.** In contrast to Facebook's universal approach, some public networks focus on the needs and interests of a specific audience. The most widely used of these is LinkedIn, with its emphasis on career- and sales-related networking.
- **Private social networks.** Like ExterionMedia, many companies use private social networks to help employees stay connected. Facebook's Workplace, for example, uses the same concept as the public version of Facebook but with additional collaboration features aimed at business users.[15]

User-generated content (UGC) is any social media content about a company or its products that is created independently by customers or other outsiders.

- **User-generated content websites. User-generated content (UGC)** is any social media content about a company or its products that is created independently by customers or other outsiders. Store reviews on Yelp and troubleshooting videos posted to YouTube are two examples of UGC. See "Facilitating User-Generated Content" on page 230 for more information.
- **Content-curation websites.** In many fields of business, so much original content is already available that sometimes the biggest value a communicator can offer audiences is guiding them to the best of what's out there rather than creating new content. Named after the selection process that museum curators do when they decide which pieces in their collections to display, **content curation** involves finding and sharing valuable material on social media. See "Curating and Sharing Existing Content" on page 229 for more information.

Content curation is the process of collecting and presenting articles, videos, and other material on a particular topic in a way that makes it convenient for target readers.

- **Community Q&A websites.** Community Q&A sites, where people answer questions posted by other visitors, are a contemporary twist on the early ethos of computer networking, which was people helping each other. Community Q&A sites include dedicated customer support communities (such as those hosted on Get Satisfaction), public sites (such as Quora), and support forums that many companies host on their own websites. See "Responding to Existing Content and Questions" on page 229 for more information.

FOUR CONTENT STRATEGIES FOR BUSINESS SOCIAL NETWORKING

You have multiple options when it comes to content on social networking.

One of the most appealing aspects of social networking for both internal and external communication is the range of options you have for connecting with your communities and for creating and sharing content:

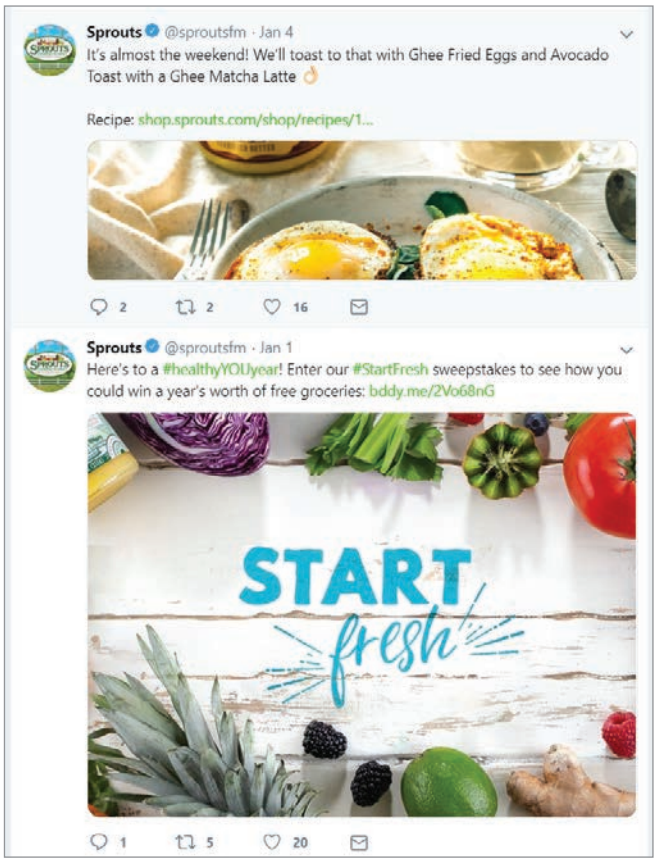
- Developing and sharing original content
- Responding to existing content and questions
- Curating and sharing existing content
- Facilitating user-generated content

The following sections offer advice on each of these communication strategies.

Developing Original Social Media Content

For business social networking, much of the value you can provide will come from original insights and information you offer your readers. A good approach is to put yourself in the minds of your social connections and ask what information they could use to improve some aspect of their personal or professional lives.

In many instances, the need or desire to share information will be triggered by some change or event, such as when you need to let your employees know about a new company policy. In others, your motivation will be a matter of enlightened self-interest, when you want to create some visibility for yourself or your company while helping others (see Figure 8.4).



Twitter screenshot of Sprouts

Figure 8.4 Developing Original Material for Social Media
In these tweets, Sprouts Farmers Market illustrates two of the options for creating original content to share with social media followers. The first tweet offers helpful information (a tactic known as *content marketing*—see page 359), and the second generates interest with a contest that should appeal to a wide range of followers.

For example, you could share tips on using a product more effectively or ideas for saving money. If the information is useful to your readers, sharing it will solidify your reputation as a valuable social media partner.

Responding to Existing Content and Questions on Social Media

Responding to questions can be a great way to encourage conversations, build brands, demonstrate a commitment to customer service, and clear up confusion or misinformation.

Responding to questions can be a great way to encourage conversations, build your personal brand, demonstrate your company's commitment to customer service, and clear up confusion or misinformation about your company and its products.

Keep in mind that when you respond to an individual query, whether on your own pages or on a community Q&A site, you are also "responding in advance" to every person who comes to the site with the same question in the future. In other words, you are writing a type of reference material in addition to corresponding with the original questioner, so keep the long time frame and wider audience in mind.

Curating and Sharing Existing Social Media Content

At its simplest, content curation can involve sharing links to useful articles or videos via your social media accounts. Companies can also set up dedicated websites that publish links to original content in a variety of topic categories.

As an alternative, several web services offer ready-made content curation solutions. Pinterest and Scoop.it, for example, make it easy to assemble attractive online portfolios or magazines on specific topics. Content curation is also a good solution for internal communication, if the employees in a firm need to stay up to date on developments in their professions or in the industries in which the company does business.

Curating content for your readers can be a great way to add value and stand out as an expert in your field.

Curating content for a target audience can be a great way to add value and stand out as an expert in your field, but content curators need to be aware of two key ethical concerns. First, never copy anyone else's posts to your site, even if you properly attribute the source. Instead, provide a link from your site back to the original so that you drive web traffic to the originator's site. It is acceptable to copy a brief introductory segment, such as the first paragraph, to your site in order to give the link some context. Scoop.it handles these steps for you automatically, including posting proper attribution on your site and downsizing photos and other images from the original so they don't display at full resolution on your site.[16]

If you promote yourself as an expert when you curate content, people will expect you to do a competent job of finding and filtering materials.

Second, you are promoting yourself as an expert when you curate content, and people will expect you to do a competent job of finding and filtering materials. As with any communication task, make sure you understand the needs of your target audience so that you can provide the best material to meet their needs.[17]

Facilitating User-Generated Content

As with other social media, one of the keys to effective UGC is making it easy for people to contribute content that others will find valuable. First, encourage content that people will want to see and share with colleagues, such as tips from experienced customers on various ways to use a product. Second, make material easy to find, consume, and share. For example, a *branded channel* on YouTube lets a company organize all its videos in one place, making it easy for visitors to browse the selection or subscribe to get automatic updates of future videos. YouTube lets fans share videos through email or their accounts on Twitter, Facebook, and other platforms.

Companies can encourage UGC submissions on their own websites or through other social media platforms, such as Twitter, Facebook, and Instagram.

Companies can encourage UGC submissions on their own websites or through other social media platforms, such as Twitter, Facebook, and Instagram. Wayfair, Netflix, Starbucks, and Belkin are among the companies that generated thousands of responses when they invited customers to submit photos and other media.[18]

As one example of the way these sites are changing business communication, Yelp has become a major and sometimes controversial influence on consumer behavior at a local level by aggregating millions of reviews of stores, restaurants, and other businesses across the United States.[19] With the voice of the crowd affecting consumer behavior, businesses need to (1) focus on performing at a high level so that customers reward them with positive reviews and (2) get involved on Yelp (the site encourages business owners to tell potential customers about themselves). These efforts could pay off much more handsomely than advertising and other conventional communication efforts.

Successful Business Blogging

4 LEARNING OBJECTIVE

Discuss the role of blogging in business, and offer tips for successful blogging.

Blogs are online journals that combine the conversational, community aspects of social media with the ability to produce nicely formatted articles.

Blogs (short for *web logs*) began as online journals that were much easier to update than conventional websites used to be. A unique advantage of blogging is combining the conversational, community-building functions of social networking with the ability to produce nicely formatted articles of almost any length that can incorporate a variety of multimedia elements. Blog content also has a more permanent feel to it than social networking content, particularly with categorization tags that make it easy to find older content. In contrast, social networking posts tend to be more ephemeral and quickly fade from audience view.

Blogging has a prominent place in business communication, as both standalone blogs and as elements on regular company websites. IBM, for instance, has dozens of blogs on its website, each focusing on a specific subject of interest to customers.[20]

BUSINESS APPLICATIONS OF BLOGGING

Businesses use blogs for a wide variety of purposes to support operations, intelligence gathering, and relationship building.

Blogs are a potential solution whenever you have a continuing stream of in-depth information to share with an online audience—and particularly when you want the audience to have the opportunity to respond through the commenting feature that most blogs have. As with social networking, blogs have multiple uses across the three categories of operations, intelligence, and relationships (see Table 8.3). Note that some of the application

TABLE 8.3 Common Business Uses of Blogging

Operations	Intelligence	Relationships
Recruiting. Using a blog is a great way to let potential employees know more about a company, the people who work there, and the nature of the company culture.	**Soliciting feedback on product designs and other decisions.** Designers can describe new features or new product ideas and ask readers to offer comments and critiques.	**Building communities.** Like social networking, blogs can bring together communities of practice and communities of interest, both internally and externally.
Project management and team communication. Teams can use blogs to keep everyone up to date, particularly when team members are geographically dispersed.	**Gathering data on customer sentiment, product usage, and other variables.** Customer comments on company blogs posts can be a treasure trove of intelligence on how customers feel about a company and its products.	**Supporting customers.** Blogs are a good channel to use when a company has in-depth technical support advice or other information to share with customers.
Word-of-mouth marketing. Bloggers often make a point of providing links to other blogs and websites that interest them, giving marketers a great opportunity to have their messages spread by enthusiasts.	**Background checks.** Employers often search for and evaluate the blogs of prospective employees, making blogging a good way to build a name for yourself within your industry or profession.	**Sharing customer success stories.** Case studies and other forms of product-usage stories help potential customers learn the value of a company's products and services.
Influencing public policy. Executives can share their opinions and provide business-oriented insights regarding regulations and other issues that affect business.	**Monitoring blog conversations.** Companies often monitor their competitors' blogs to track competitive threats, for example.	**Sharing industry news.** Customers often look to the companies that provide them with products and services to keep them up to date on developments.
		Humanizing a company. Companies can use blogs to share stories about events and efforts not directly related to sales and products, such as charity work and community projects.
		Educating customers and other stakeholders. Blogs are a good format for explaining a variety of topics, such as giving tips on using a company's products more effectively. Doing so can improve sales and support productivity as well, by reducing the need for one-on-one communication.
		Connecting with the public and the news media. Many company employees and executives now share company news with the general public and journalists.
		Engaging employees. Blogs can enhance communication across all levels of a company, giving lower-level employees a voice that they might not otherwise have and giving senior executives better access to timely information.
		Responding to questions. Companies can use blogs to answer stakeholder questions.

areas overlap with social networking, with blogging being better suited for longer pieces and the ability to build up a catalog of easily searchable content on specific topics.

The uses of blogs are limited only by your creativity, so be on the lookout for new ways you can use them to foster positive relationships with colleagues, customers, and other important audiences (see Figure 8.5 on the next page).

Check out the "Five-Minute Guide to Better Blog Posts" at the end of the chapter.

TIPS FOR SUCCESSFUL BLOGGING

The three-step writing process is easy to adapt to blogging. This section offers helpful tips on each step.

Planning a Blog and Individual Blog Posts

The planning step is particularly important when you're launching a blog because you're planning an entire communication channel, not just a single message. Pay close attention to your audience, your purpose, and your scope:

Before you launch a blog, make sure you have a clear understanding of your target audience, the purpose of your blog, and the scope of subjects you plan to cover.

- **Audience.** Except with project team blogs and other efforts that have an obvious and well-defined audience, defining the target audience for a blog can be challenging. You want an audience large enough to justify the time you'll be investing but narrow enough that you can provide a clear focus for the blog. For instance, if you work for a firm that develops video games, would you focus your blog on elite players who spend thousands of dollars on super-fast PCs optimized for video games, or would you broaden the reach to include all gamers? The decision often comes down to business strategy.

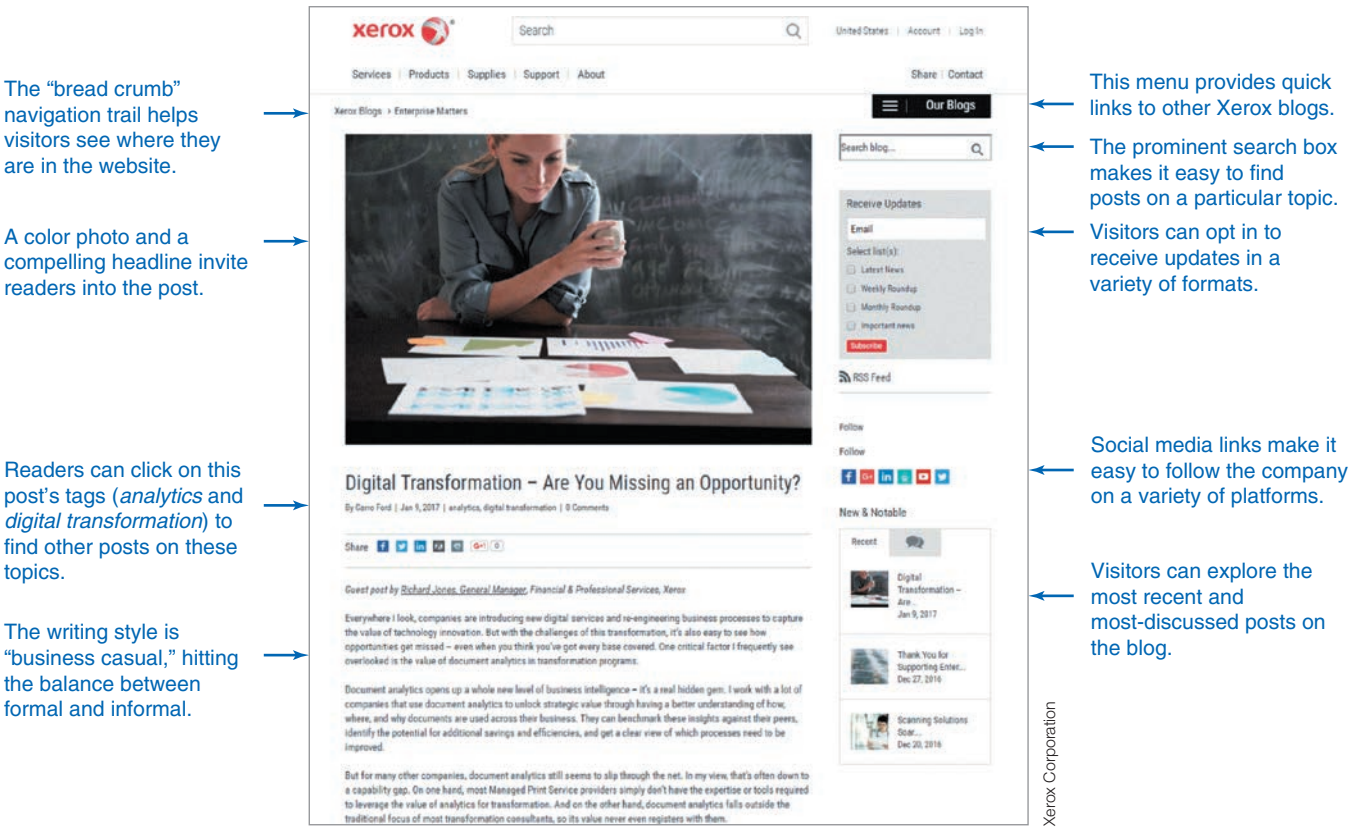


Figure 8.5 Business Applications of Blogging
This Xerox blog illustrates the content, writing style, and features that make an effective, reader-friendly company blog.
Source: Courtesy of Xerox Corporation.

- **Purpose.** A business blog needs to have a business-related purpose that is important to your company and to your chosen audience. Moreover, the purpose needs to "have legs"—that is, it needs to be something that can drive the blog's content for years—rather than focusing on a single event or an issue of only temporary interest. For instance, if you're a technical expert, you might create a blog to give the audience tips and techniques for using your company's products more effectively—a never-ending subject that's important to you and your audience. This would be the general purpose of your blog; each post would have a specific purpose within the context of that general purpose. Finally, if you are not writing an official company blog but rather blogging as an individual employee, make sure you understand your employer's blogging guidelines. IBM, for example, gives its employees 12 specific *social computing* guidelines, such as respecting intellectual property laws and identifying their role as IBM employees if they are discussing matters related to the company.[21]
- **Scope.** Your decisions about audience and purpose will define the right scope for your blog, meaning the range of subjects you will cover and the depth you'll go into on various topics. Once you start to build an audience, they'll expect you to cover the same general range of topics.

Thoughtful planning needs to continue with each message. Unless you're posting to a restricted-access blog, you can never be sure who might see your posts. Other bloggers and social media users might link to them months or years later.

Writing Blog Posts

Use a comfortable, personal writing style with an authentic voice. Bear in mind, though, that comfortable does not mean careless. Sloppy writing damages your credibility.

Audiences expect you to be knowledgeable in the subject area your blog covers, but you don't need to know everything about a topic. If you don't have all the information yourself, provide links to other blogs and websites that supply relevant information. In fact, content curation (see page 229) is one of the most valuable aspects of blogging. Just be sure the content you share is relevant to your readers and compatible with your communication goals.

Content curation is a natural way to expand the content you can offer on your blog.

Certain types of blog posts tend to attract the most readers:[22]

Blog posts that offer immediately helpful, easy-to-consume information tend to be the most popular.

- Lists of anything relevant to reader interests (lists are particularly appealing because they are easy to skim)
- Tutorials and other "how to" advice
- Comparisons of products or other relevant subjects
- Advice or observations based on original research
- Success tips
- Interviews
- Solutions to common problems
- Infographics
- "Roundups" that compile ideas, tips, or predictions from multiple experts on a topic
- Guest posts from subject matter experts
- Case studies that describe how an individual or a company met a business challenge

As with all social media content that involves headlines, titles for blog posts are an essential tool to draw in readers. Titles need to grab the reader's attention in a split second by promising something useful, surprising, challenging, or otherwise different from what he or she already knows. Make them descriptive, clear, and direct. A headline such as "You win some, you lose some" doesn't tell the audience much of anything and probably won't compel many people to read the post. In addition, use the title to suggest that the information in the post will be easy to read and easy to apply. List-style posts can make particularly compelling headlines, such as "10 Reasons You Didn't Get That Promotion" or "Seven Ways to Save Money with Your Smartphone." The advice on email subject lines (see page 197) can be applied to blog post titles as well.

As with all social media headlines, titles for blog posts need to grab the reader's attention in a split second with promises of useful information.

Encourage audiences to join the conversation. Not all blogs invite comments, although most do, and many bloggers consider comments to be an essential feature. Blog comments can be a valuable source of news, information, and insights. To protect against comments that are not helpful or appropriate, many bloggers review comments before allowing them to be displayed.

To make it easy for your readers to share your content, highlight tweetable passages that they might want to share with their followers on Twitter. A variety of widgets are available for blogging systems to help you create "tweetables."

Completing Blog Posts

Completing messages for your blog is usually quite easy. Most formatting choices are predefined by a template or theme, so once you've chosen this look, it's simply a matter of adding your text and any media elements, such as photos and videos. Before you publish each post, evaluate the content for readability, and proofread to correct any errors.

Make your posts easier to find by **tagging** them with descriptive words. Your readers can then select these "content labels" to find additional posts on those topics. Tags are usually displayed with each post, and they can also be groups in a *tag cloud* or other display that shows all the tags in use on your blog.

Tagging is the practice of labeling blog posts with descriptive words that readers can use to find other posts on the same topic.

Distribution is handled automatically by most blogging systems, so once you've set this up, all you need to do is hit the publish button. Blog distribution is sometimes referred to as *syndication*, and posts are published via a *newsfeed*, which lets audiences subscribe to blogs of interest. Really Simple Syndication (RSS) and Atom are the most common newsfeeds.[23]

Table 8.4 on the next page offers a variety of tips for successful blogging, and "Checklist: Blogging for Business" summarizes some of the key points to remember when creating and writing a business blog.

TABLE 8.4 Tips for Effective Business Blogging

Tip	Why It's Important
Don't blog without a clear plan.	Without a plan, your blog is likely to wander from topic to topic and fail to build a sense of community with your audience.
Post frequently; the whole point of a blog is fresh material.	If you won't have a constant supply of new information or new links, create a traditional website instead.
Make it about your readers and the issues important to them.	Readers want to know how your blog will help them or give them a chance to communicate with others who have similar interests.
Write in an authentic voice; never create an artificial character who supposedly writes a blog.	Fake blogs show disrespect for your audience.
Link generously but thoughtfully.	Providing interesting links to other blogs and websites is a fundamental aspect of blogging, but make sure the links will be of value to your readers. Don't point to inappropriate material.
Don't post anything you wouldn't want the entire world to see.	Future employers, government regulators, competitors, journalists, and community critics are just a few of the people who might eventually see what you've written.
Minimize marketing and sales messages.	Readers want information about them and their needs.
Write compelling, specific headlines for your post.	Readers usually decide within a couple of seconds whether to read your posts; boring or confusing headlines will turn them away.
Pay attention to spelling, grammar, and mechanics.	No matter how smart or experienced you are, poor-quality writing undermines your credibility with intelligent audiences.
Respond to criticism openly and honestly.	Hiding sends the message that you don't have a valid response to the criticism. If your critics are wrong, patiently explain why you think they're wrong. If they are right, explain how you'll fix the situation.
Listen and learn.	Take the time to analyze the comments people leave on your blog and the comments other bloggers make about you.
Respect intellectual property.	Improperly using material you don't own is unethical and can be illegal.
Be scrupulously honest and careful with facts.	Honesty is an absolute requirement for every ethical business communicator, of course, but you need to be extra careful online because inaccuracies (both intentional and unintentional) are likely to be discovered quickly and shared widely.
If you review products on your blog, disclose any beneficial relationships you have with the companies that make those products.	Bloggers who receive free products or other compensation from companies whose products they write about are now required to disclose the nature of these relationships.

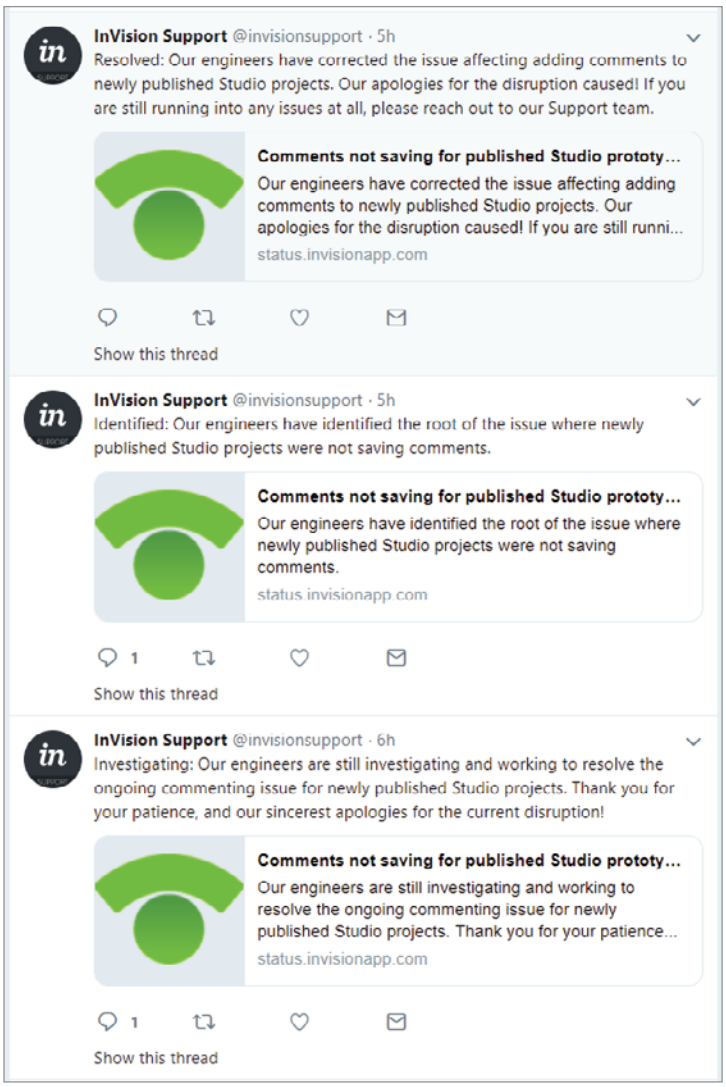
CHECKLIST ✓ Blogging for Business

- Consider creating a blog or microblog account whenever you have a continuing stream of information to share with an online audience.
- Identify an audience that is big enough to justify the effort but narrow enough to have common interests.
- Identify a purpose that is comprehensive enough to last over the long haul.
- Define the scope of topics you'll cover based on your decisions about target audience and purpose.
- Communicate with a personal style and an authentic voice, but don't write carelessly.
- Include media items that your readers will find interesting, such as infographics, photos, and videos.
- Look for ways to expand the value you offer readers by mixing in curated content with your original materials.
- Encourage audiences to join the conversation.
- Tag posts with descriptive labels to help readers find other posts you've written.

Twitter and Other Microblogging Systems

5 LEARNING OBJECTIVE
Describe the business uses of Twitter and other microblogging systems, and offer tips for writing effective business tweets.

A **microblog** is a variation on blogging in which messages are sharply restricted to specific character counts. Twitter is the best known of these systems, but many others exist. Some companies have private microblogging systems for internal use only, either as standalone services or as part of broader collaboration systems. Like regular blogging, microblogging quickly caught on with business users and is now a mainstream business medium (see Figure 8.6).



InVisionApp Inc.

Figure 8.6 Business Applications of Microblogging
The software company InVision uses Twitter to update its customer base on the resolution of issues that users of its app have reported. The immediacy of Twitter is perfect for this—and notice how quickly InVision solved this problem and communicated the outcome to its customers. In the space of an hour, the company reported that it had investigated the issue, identified the cause, and engineered a solution.

BUSINESS APPLICATIONS OF MICROBLOGGING

A *microblog* (such as Twitter) is a variation on blogging in which messages are sharply restricted to specific character counts.

Microblogs are used for most of the blog applications mentioned in Table 8.3, although there are several differences to keep in mind. First, the strict limits on message length (such as Twitter's current limit of 280 characters) require a different approach to writing. Part of the beauty of microblogging, in fact, is that it requires writers to distill messages down to their essence. (Readers appreciate this brevity so much that many Twitter users were not pleased when the service doubled the character count from 140 to 280.) If you want to share a message that is longer than a particular system's limit, you can thread several messages in a chain, convert the text to a graphic and post it as an image, or link to the longer message on your blog, Facebook page, or other system.

Readers expect and appreciate concise, focused messages on Twitter and other microblogging systems.

Second, Twitter has a more distinct social component than blogging, thanks to how easy it is to connect with other users, share messages through *retweeting*, and respond to anyone on the system. By following more and more users, posting valuable content, and engaging with other users, you can quickly attract hundreds or thousands of followers.

Twitter has a more distinct social component than blogging, which gives the system some of the advantages of social networking.

MOBILE APP
The **Twitter** mobile app helps you stay connected with your followers and the accounts you follow.

Third, thanks to that social component, Twitter can take on a conversational aspect that is somewhat similar to group messaging. Anyone who sees a tweet can reply to it, which often starts a conversation as more people join in.

TIPS FOR EFFECTIVE BUSINESS TWEETS

Follow these tips to make the best use of Twitter:[24]

Before you start a business-oriented Twitter account, clarify your purpose or theme and stick to it as you begin to tweet.

Hashtags are a great way to find tweets on specific topics and to label your tweets so others can find them.

Retweeting is the microblogging equivalent of content curation.

- As with a blog, define the purpose of your Twitter account, and maintain that theme over time.
- Keep up a regular flow of tweets so that you don't fall off your audience's radar.
- Don't slip into careless writing; remember that it's still business communication.
- Use hashtags if you are tweeting on topics that people are likely to search for, but use them sparingly—tweets clogged with multiple hashtags are not inviting to read.
- Link Twitter with your other digital channels, such as using Twitter to announce new blog posts.
- Curate content from other Twitter accounts by retweeting messages that your followers will appreciate.
- Explore your followers' timelines to see what interests them and use these insights to shape your Twitter content plan.
- Tag other users by including their Twitter name in tweets, but do so carefully; not everyone appreciates getting pulled into Twitter conversations.
- Move conversations to direct messaging (private messages) when appropriate.

Collaborative Writing on Wikis

6 LEARNING OBJECTIVE
Identify four considerations when setting up a business wiki, and explain how to become a valuable wiki contributor.

When companies need to organize a substantial amount of information on a subject and encourage input from multiple authors, a wiki can be a great tool. You are probably familiar with Wikipedia, the open-source encyclopedia. Business wikis follow the same basic concept.

Some common wiki applications for business communication are reference dictionaries or encyclopedias, user manuals, and customer service guides. For example, the energy management company Schneider Electric set up a dictionary-style wiki to give its 140,000 global employees a common reference for all the technical terms they need to use in their work. When Schneider's knowledge-management specialists discovered that employees throughout the company were compiling their own glossaries, they realized a shared resource would save everyone time and ensure consistent information.[25]

MANAGEMENT AND DESIGN CONSIDERATIONS FOR WIKIS

Before launching a wiki, companies need to consider several key questions:

Think carefully about the purpose of a wiki and any necessary restrictions on its use before you launch it.

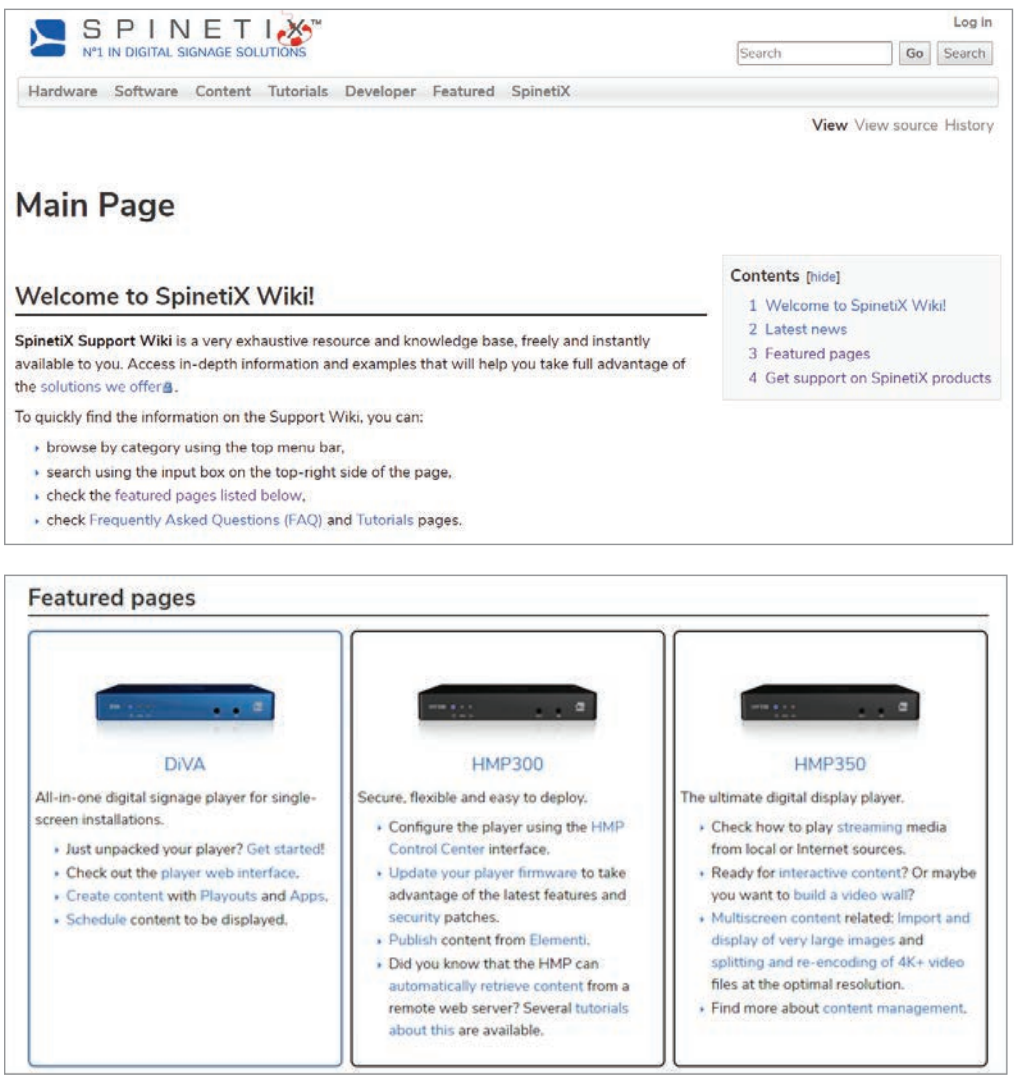
- **Public or private access.** With public wikis, such as Wikipedia, anyone who registers can edit existing entries and add new entries. Corporate wikis, in contrast, are typically private, meaning access is restricted to approved contributors. In addition, a company can restrict who can view a wiki, such as employees only, registered customers, or the general public.
- **Moderation and validation.** A big appeal of the wiki approach is that new or modified content usually goes "live" as soon as contributors create or edit their material. However, to ensure consistency or quality, companies may opt to *moderate* content by having it approved by management or technical experts either before or after it goes live. On the Schneider Electric wiki, for instance, entries go live as soon as they are written, but a moderator is alerted to the new content. If the moderator reviews and approves the content, the entry is then designated as "validated," and these validated entries are visually distinguished from entries that haven't been reviewed and approved.[26]

- **Ongoing contribution.** Like other shared communication efforts, wikis sometimes launch with a burst of enthusiasm and a lot of fresh content from multiple contributors, only to fizzle out over time. A wiki can become a "ghost town" if contributors lose the motivation to add or update content and readers stop referring to it because it doesn't seem to offer anything new. Management can prevent a wiki from going stale by incentivizing contributors with recognition or rewards and by making sure that employees have time in their schedules to develop fresh content.
- **Design and ease of use.** A potential drawback of wikis is the difficulty of finding information, particularly if a wiki grows to hundreds or thousands of entries. Spinetix, which makes systems that control digital signage, addressed this issue in its customer-support wiki by letting visitors access the content in multiple ways (see Figure 8.7).

TIPS FOR SUCCESSFUL WIKI WRITING

Being an effective wiki collaborator requires a different writing mindset.

Becoming a valuable wiki contributor requires a slightly different mindset than you're likely to have with your other business writing. The most important difference is letting go of the sense of ownership and desire for individual recognition that you may have



SpinetiX

Figure 8.7 Wikis for Business Communication
Spinetix supports its customers with an extensive wiki. In addition to providing in-depth information, the wiki is carefully designed to make information easy to find, as these two screen captures indicate. The welcome message explains how to find information, the menu bar along the top provides direct access to various categories of help, and the featured pages list commonly needed information about specific products.

about your contributions. Remember that wikis are a group effort, and the combined contribution of the "hive mind" is a wiki's greatest value. Once you publish something on a wiki, it's no longer "yours," and anyone who participates in that wiki is welcome to improve it or update it over time.

By the same token, look for opportunities to improve and update the work that others have published. If you see an opportunity to make changes, use the list of questions on page 163 in Chapter 6 to evaluate the content before making changes.

If you are adding a page or an article to an existing wiki, figure out how this new material fits in with the existing organization. Determine whether any similar material already exists; it might be better to expand an existing article or add a subpage than to create a new item. Also, learn the wiki's preferred style for handling incomplete articles. For example, on the wiki that contains the user documentation for the popular WordPress blogging software, contributors are discouraged from adding new pages until the content is "fairly complete and accurate."[27]

If others might disagree with a change you would like to make to a wiki entry, you can use the wiki's discussion facility to share your thoughts and intentions with other contributors.

If you recognize that your planned changes might not meet with universal approval, you can use the wiki's discussion facility to share your thoughts and intentions with other contributors. The wiki environment should encourage discussions and even robust disagreements, as long as everyone remains civil and respectful. Note that many wikis provide both editing and commenting capabilities, and participants should use the appropriate tool for each. In other words, don't insert comments or questions into the main content; use the "talk page" or other commenting feature if you want to discuss the content.

Finally, take care not to let individual pages grow too long over time as people continue to add content. Periodically assess whether these pages need to be restructured and divided into multiple smaller pages to simplify reading.[28]

COMMUNICATION CHALLENGES AT ExterionMedia

You work in ExterionMedia France's human resources department. Use what you've learned in this chapter to solve these communication challenges.

INDIVIDUAL CHALLENGE: You've written a blog entry describing an upcoming competition in which employees will be challenged to film short videos of themselves at work (using their smartphones), talking about their daily activities on the job and what it means to work at ExterionMedia. The three best videos will be posted to the careers section of the company's website, and those three employees will receive gift certificates to one of Paris's best restaurants. Write a microblog message for the Sociabble internal network of no more than 150 characters that will serve as a teaser to persuade employees to click or tap through to the blog post.

TEAM CHALLENGE: You are on a team that has been assigned the task of updating the employee handbook. New employees aren't always sure how to go about contributing content to the internal social network. With your team, review the advice throughout this chapter and come up with five writing tips you can add to the handbook.

Key Terms

blog An easily updatable online journal; short for *weblog*

brand communities Groups of people united by their interest in and ownership or use of particular products

brand socialization A measure of how effectively a company engages with its various online stakeholders in a mutually beneficial exchange of information

content curation The practice of collecting, filtering, and republishing material on a particular topic

microblog A variation on a blog in which messages are restricted to specific character counts; Twitter is the best-known example

social networks Online services that enable individual and organizational members to form connections and share information

tagging The practice of attaching descriptive terms to blog posts and other articles to facilitate searching

user-generated content (UGC) Social media content about a company or its products that is created independently by customers or other outsiders

Summary of Learning Objectives

1 Discuss six common uses of social media for business communication. Social media can be used in a wide variety of ways for internal and external communication. Six ways discussed in the chapter are integrating and expanding company workforces, fostering collaboration, building communities, socializing brands and companies, supporting customers, and understanding target markets.

2 Explain how to develop a social media strategy and social media content. A good social media strategy answers six questions, which can be summarized as *why* (why are we using social media), *who* (who is our target audience and who will create the content), *what* (what is our message strategy), *how* (how will we create and distribute content), *where* (where will we distribute our content), and *when* (when we will post new material and how responsive do we need to be to incoming messages).

The three-step writing process works nicely for social media content, with a few extra considerations. In the planning step, take a conversational approach, support the ways your readers want to consume information, provide information that your connections are likely to share, restrict promotional efforts to the right time and place, promote a sense of community, and be transparent. In the writing step, choose the best compositional mode for each message and social media service, write informally but not carelessly, write specific and informative headlines, and look for opportunities to include visual content. In the completing step, review for quality, look for opportunities to improve readability, and think before you post.

3 List the most common types of social networks used in business and four content strategies for social networking. Six types of social networks are (1) public, general-purpose social networks, such as Facebook; (2) public, specialized social networks, such as LinkedIn; (3) private, internal social networks; (4) user-generated content websites, such as YouTube; (5) content-curation websites; and (6) community Q&A websites. Four content strategies for social networking are developing and sharing original content, responding to existing content and questions, curating and sharing existing content, and facilitating user-generated content.

4 Discuss the role of blogging in business, and offer tips for successful blogging. Blogs are used in numerous ways in business today, in all phases of operations, intelligence, and relationship building. Some common uses are recruiting, project management and team communication, customer support, market research, and employee engagement.

The three-step writing process adapts readily to blogging. When planning, be particularly careful in defining your audience, identifying the overall purpose of your blog and the specific purposes of each post, and establishing a scope that is narrow enough to be focused but broad enough to afford a steady supply of topics. Be sure to write in a personal, authentic style without slipping into overly familiar or careless writing. Completing messages involves the usual tasks of proofing and revising before posting along with the particular tasks needed to distribute your posts via newsfeeds.

5 Describe the business uses of Twitter and other microblogging systems, and offer tips for writing effective business tweets. Microblogs, such as Twitter, are used for many of the same purposes as conventional blogging, although the length restrictions require a different approach to writing. The tips for successful tweeting including defining a clear purpose for your Twitter account, keeping a regular flow of tweets, using hashtags as appropriate, linking Twitter with other social media accounts, retweeting material of interest to your followers, and exploring your followers' timelines to see what interests them.

6 Identify four considerations when setting up a business wiki, and explain how to become a valuable wiki contributor. Four considerations when setting up a wiki are choosing public or private access, deciding whether to moderate and validate new entries, establishing incentives to ensure a continuous flow of new content, and designing the wiki to be easy for readers to use. To become a valuable wiki contributor, let go of traditional expectations of authorship, including individual recognition and control; don't be afraid to edit and improve existing content; discuss controversial changes on the "talk page" before making them; and keep edits and comments separate by using the "talk page" to discuss content.

Test Your Knowledge

To review chapter content related to each question, refer to the indicated Learning Objective.

8-1. How have social media tools spurred the growth of communities of practice? [LO-1]
8-2. What is social customer service? [LO-1]
8-3. Why are social media metrics important? [LO-2]
8-4. What is employee advocacy in the context of social media? [LO-2]
8-5. Why are straightforward, informative headlines better for social media than headlines with witty wordplay? [LO-2]
8-6. What is user-generated content? [LO-3]
8-7. What is content curation? [LO-3]
8-8. Why is it important to have a long-term, sustainable purpose in mind before you launch a blog? [LO-4]
8-9. Why does Twitter have a more conversational feel than conventional blogging? [LO-5]
8-10. Why is it important to abandon traditional notions of ownership when writing on a wiki? [LO-6]

Apply Your Knowledge

To review chapter content related to each question, refer to the indicated Learning Objective.

8-11. How can social media help a company transition from a traditional structure to a virtual organization? [LO-1]
8-12. Why is it essential for a company to set goals for its social media effort? [LO-2]
8-13. Why are headlines and post titles a critical part of social media writing? [LO-2]

8-14. How does content curation add value for readers? [LO-3]

8-15. If one of the benefits of blogging and microblogging is the personal, intimate style of writing, is it a good idea to limit your creativity by adhering to conventional rules of grammar, spelling, and mechanics? Why or why not? [LO-4]

8-16. What are some of the ways the president of a hiking equipment company can use Twitter to engage potential customers without being overtly promotional? [LO-5]

8-17. If you know that most readers of your management advice blog access it on mobile devices, should you switch to Twitter instead so the shorter messages would be easier to read on small screens? Why or why not? [LO-5]

8-18. Why would a company consider moderating and possibly validating wiki entries? [LO-6]

Practice Your Skills

Message for Analysis

8-19. **Blogging, Creating a Businesslike Tone [LO-4]** Revise this blog post based on what you've learned in this chapter.

[headline]

We're DOOMED!!!!!

[post]

I was at the Sikorsky plant in Stratford yesterday, just checking to see how things were going with the assembly line retrofit we did for them last year. I think I saw the future, and it ain't pretty. They were demo'ing a prototype robot from Motoman that absolutely blows our stuff out of the water. They wouldn't let me really see it, but based on the 10-second glimpse I got, it's smaller, faster, and more maneuverable than any of our units. And when I asked about the price, the guy just grinned. And it wasn't the sort of grin designed to make me feel good.

I've been saying for years that we need to pay more attention to size, speed, and maneuverability instead of just relying on our historical strengths of accuracy and payload capacity, and you'd have to be blind not to agree that this experience proves me right. If we can't at least show a design for a better unit within two or three months, Motoman is going to lock up the market and leave us utterly in the dust.

Believe me, being able to say "I told you so" right now is not nearly as satisfying as you might think!!

Exercises

Each activity is labeled according to the primary skill or skills you will need to use. To review relevant chapter content, you can refer to the indicated Learning Objective. In some instances, supporting information will be found in another chapter, as indicated.

8-20. **Media Skills: Social Networking, Team Skills [LO-3]** With a team assigned by your instructor, choose one of these companies: Apple, Nordstrom, 3M, or Verizon. Evaluate 10 of its social media posts on Facebook, Twitter, or any other social platform you can find them. How would you characterize the company's communication style based on these posts? Do its writers use emojis or slang, for example? Summarize your findings in a post for your class blog or an email to your instructor.

8-21. **Media Skills: Social Networking [LO-3]** Imagine that you are in charge of strategic planning for Ford Motor Company. Identify one of Ford's key competitors, and search through social media sources (both the company's own social media accounts and others) to find three strategically relevant pieces of information about this competitor. Examples could include the hiring of a new executive, the launch of a major new product, or a significant problem of some kind. In a post on your class blog, identify the information you found and the sources you used. (If you can't find useful information, pick another firm or try another industry.)

8-22. **Media Skills: Social Networking [LO-3]** Joining an ongoing social media conversation, such as a comment thread on Facebook, requires a delicate touch if you work for a company that has a commercial interest in the subject at hand. Imagine you work for a company that makes audiophile-quality headphones, acoustic guitars, or electronic drum kits (choose whichever product interests you most). While monitoring a Facebook group for enthusiasts of this product category, you see an active thread in which people are complaining about the quality of one of your competitor's products. You know that for years this company had a reputation for making high-quality equipment, but after a poorly executed plan to outsource manufacturing in order to cut costs, quality has suffered. A similar product that your company offers is slightly more expensive but has significantly higher quality, according to a recent survey conducted by a respected and impartial industry website.

Draft a comment that you could use to join the conversation. Decide what information you'll include and whether you will disclose your company affiliation. Assume that representatives from various companies do occasionally make posts and leave comments in this group, but overt selling is explicitly forbidden by the group's moderator.

8-23. **Media Skills: Blogging; Creating a Businesslike Tone; Mobile Skills [LO-4]** The members of the project team you lead have enthusiastically embraced blogging as a communication medium. Unfortunately, as emotions heat up during the project, some of the blog posts are becoming too casual, too personal, and even sloppy. Because your boss and other managers within the company also read this project blog, you don't want the team to seem unprofessional. Revise the following blog post so that it communicates in a more businesslike manner while retaining the informal, conversational tone of a blog. In addition, break it into smaller paragraphs that are more compatible with mobile devices. (Be sure to

correct any spelling and punctuation mistakes you find as well.)

[post]

Well, to the profound surprise of absolutely nobody, we are not going to be able meet the June 1 commitment to ship 100 operating tables to Southeast Surgical Supply. (For those of you who have been living in a cave the past six month, we have been fighting to get our hands on enough high-grade chromium steel to meet our production schedule.) Sure enough, we got news, this morning that we will only get enough for 30 tables. Yes, we look like fools for not being able to follow through on promises we made to the customer, but no, this didn't have to happpen. Six month's ago, purchasing warned us about shrinking supplies and suggested we advance-buy as much as we would need for the next 12 months, or so. We naturally tried to followed their advice, but just as naturally were shot down by the bean counters at corporate who trotted out the policy about never buying more than three months worth of materials in advance. Of course, it'll be us—not the bean counters who'll take the flak when everybody starts asking why revenues are down next quarter and why Southeast is talking to our friends at Crighton!!! Maybe, some day this company will get its head out of the sand and realize that we need to have some financial flexibility in order to compete.

8-24. Media Skills: Blogging [LO-4] Find a current political issue that could have a direct effect on business, such as immigration law, internet sales tax, product safety, or international trade policy. Identify a company that is affected by this issue, and assume you are the president or CEO and want to speak out about it. Write a three-paragraph blog post that summarizes the issue, explains how it could affect your company, and urges a particular action from political leaders.

8-25. Media Skills: Microblogging [LO-5] Busy knitters can go through a lot of yarn in a hurry, so most keep a sharp eye out for sales. You're on the marketing staff of Knitting-Warehouse, and you like to keep your loyal shoppers up to date with the latest deals. Visit the Knitting-Warehouse website at **www.knitting-warehouse.com**, choose any on-sale product that catches your eye, and compose a tweet that describes the product and the sale. (Unless you are working on a private Twitter account that is accessible only by your instructor and your classmates, don't actually tweet this message. Email it to your instructor instead.)

8-26. Media Skills: Microblogging [LO-5] Choose a product you purchased recently or something you're considering purchasing. Compose a three-tweet sequence that (1) introduces the product, (2) lists two or three important advantages, and (3) identifies which groups of consumers can benefit from it. Email your tweets to your instructor rather than posting them on Twitter.

Expand Your Skills

Critique the Professionals

On Twitter, find two companies in the same industry and review a dozen recent tweets from each. Considering the tweets from the perspective of a potential customer, which company does a better job of engaging your attention and building your interest in its products? Using whatever medium your instructor requests, write a brief analysis of the two companies' Twitter activity, and explain why one is using the social network more effectively than the other.

Sharpening Your Career Skills Online

Find a website, video, article, podcast, or presentation that offers advice on using social media in business. In a brief email message to your instructor, describe the item that you found and summarize the career skills information you learned from it.

Build Your Career

If you've been following these Build Your Career activities in the previous chapters, you should have a good start on your basic employment profile by now—what you want to do, where you want to go in your career, and what you can promise future employers. Now it's time to start researching potential employers. This research will help you uncover interesting job possibilities, inform you about various industries and the developments taking place in them, and equip you with impressive insights to use in your job interviews.

If you don't have any specific companies in mind yet, start with one of the many "best places to work" lists available online. Two great sources are *Fortune*'s annual 100 Best Companies to Work For (fortune.com/best-companies) and Great Place to Work (**reviews.greatplacetowork.com**). You can get insider reviews at Glassdoor (**www.glassdoor.com**), which also offers ranked lists of best places to work as voted by employees, along with lists of the best jobs, trends by industry, and other helpful insights.

Cases

For all cases, feel free to use your creativity to make up any details you need in order to craft effective messages.

SOCIAL NETWORKING SKILLS

8-27. Media Skills: Social Networking; Compositional Modes: Summaries [LO-2] Many companies now have *voice of the customer (VoC)* programs to collect and analyze commentary and feedback from customers. The most comprehensive of these programs automatically gather data from social media, customer call records, technical support emails, online product reviews, and more. To extract insights from these large collections of text, marketers can use an intelligent communication technology called *text analytics*.

Your task: Review the text analytics information on the Clarabridge website at **www.clarabridge.com**. (The company refers to its technology as CX Analytics, for customer experience analytics.) Write a 100- to 150-word summary of this technology that Clarabridge could use as a post on its Facebook page to explain the capability to potential customers.

SOCIAL NETWORKING SKILLS

8-28. Media Skills: Social Networking; Online Etiquette [LO-3], Chapter 2 Employees who take pride in their work are a priceless resource for any business. However, pride can sometimes manifest itself in negative ways when employees receive criticism—and public criticism is a fact of life on social media. Imagine that your company has recently experienced a rash of product quality problems, and these problems have generated some unpleasant and occasionally unfair criticism on a variety of social media sites. Someone even set up a Facebook page specifically to give customers a place to vent their frustrations.

You and your public relations team jumped into action, responding to complaints with offers to provide replacement products and help customers who have been affected by the quality problems. Everything seemed to be going as well as could be expected, until you were checking a few industry blogs one evening and discovered that a couple of engineers in your company's product design lab have been responding to complaints on their own. They identified themselves as company employees and defended their product design, blaming the company's production department and even criticizing several customers for lacking the skills needed to use such a sophisticated product. Within a matter of minutes, you see their harsh comments being retweeted and reposted on multiple sites, only fueling the fire of negative feedback against your firm. Not surprisingly, you are horrified.

Your task: You manage to reach the engineers by private message and tell them to stop posting messages, but you realize you have a serious training issue on your hands. Write a post for the internal company blog that advises employees on how to respond appropriately when they are representing the company online. Use your imagination to make up any details you need.

SOCIAL NETWORKING SKILLS/TEAM SKILLS

8-29. Media Skills: Social Networking [LO-3] Social media can be a great way to, well, socialize during your college years, but employers are increasingly checking the online activities of potential hires to avoid bringing in employees who may reflect poorly on the company.

Your task: Team up with another student and review each other's public presence on Facebook, Twitter, and any other website that an employer might check during the interview and recruiting process. Identify any photos, videos, messages, or other material that could raise a red flag when an employer is evaluating a job candidate. Write your teammate an email message that lists any risky material.

BLOGGING SKILLS

8-30. Media Skills: Blogging [LO-4] Comic-Con International (**www.comic-con.org**) is an annual convention in San Diego that highlights a wide variety of pop culture and entertainment media, from comic books and collectibles to video games and movies. From its early start as a comic book convention that attracted several hundred fans and publishing industry insiders, it has become a major international event with more than 100,000 attendees every year.[29]

Your task: Readers of your pop culture blog have been asking for your recommendation about attending Comic-Con in San Diego next summer. Write a two- or three-paragraph post for your blog that explains what Comic-Con International is and what attendees can expect to experience at the convention. Be sure to address your post to fans, not industry insiders.

BLOGGING SKILLS/MOBILE SKILLS

8-31. Media Skills: Blogging; Compositional Modes: Tutorials; Mobile Skills [LO-4] Instagram is a globally popular social networking platform that emphasizes photo and video sharing.

Your task: Write a 200- to 300-word mobile-friendly post for your class blog that explains how to set up an account on Instagram and begin posting content. The Instagram Help Center (**help.instagram.com**) is a good place to get more information about using the service.

BLOGGING SKILLS

8-32. Media Skills: Blogging; Compositional Modes: Tutorials [LO-4] Studying abroad for a semester or a year can be a rewarding experience in many ways—improving your language skills, experiencing another culture, making contacts in the international business arena, and building your self-confidence.

Your task: Write a post for your class blog that describes your college's study abroad program and summarizes the steps involved in applying for international study. If your school doesn't offer study abroad opportunities, base your post on the program offered at another institution in your state.

BLOGGING SKILLS

8-33. Media Skills: Blogging [LO-4] Credit card debt can be a crippling financial burden with myriad side effects, from higher insurance rates to more expensive loans to difficulty getting a job or a promotion. Unfortunately, credit debt is also frighteningly easy to fall into, particularly for young people trying to get started in life with limited cash flow.

Your task: Write a three- to five-paragraph blog post that warns college students about the dangers of credit card debt. Be sure to cite the sources you find in your research.

MICROBLOGGING SKILLS

8-34. Media Skills: Microblogging; Compositional Modes: Updates and Announcements [LO-5] To most consumer-goods companies, Black Friday is a massive shopping event the day after Thanksgiving, when consumers crowd into stores and retailers hope to see a big sales boost to kickstart the holiday shopping season. For the clothing company Everlane, however, Black Friday is a day for taking care of the factory workers who make the company's products. Each year, Everlane donates profits from Black Friday sales to a particular project, such as buying thousands of helmets for workers in Vietnam who travel to work on mopeds. Another year, the company installed three container farms (basically high-efficiency greenhouses built into recycled shipping containers) so a factory could double the number of meals it provides its workers.[30]

Your task: Visit www.everlane.com and read about the Black Friday Fund. Draft a tweet describing this year's Black Friday project. Limit it to 217 characters to allow room for a URL. (You don't need to include the URL.) Email the tweet to your instructor.

MICROBLOGGING SKILLS

8-35. Media Skills: Microblogging; Compositional Modes: Summaries [LO-5] A carefully constructed series of tweets can serve as a summary of a blog post, video, or other message or document.

Your task: Pick a front-page article or a news release from Boeing's website (www.boeing.com). Write two to five tweetables that summarize the content of the piece. Email the series to your instructor. If you quote phrases from the original directly, be sure to put them in quotation marks.

MICROBLOGGING SKILLS

8-36. Media Skills: Microblogging; Compositional Modes: Teasers [LO-5] Twitter updates are a great way to alert people to helpful articles, videos, and other online resources.

Your task: Find an online resource (it can be a website quiz, a YouTube video, a PowerPoint presentation, a newspaper article, or anything else appropriate) that offers some great tips to help college students prepare for job interviews. Write a teaser tweet that hints at the benefits other students can get from this resource; be sure to leave enough characters to accommodate a URL that links to the item. If your class is set up with private Twitter accounts, use your private account to send your message. Otherwise, email it to your instructor.

WIKI SKILLS

8-37. Media Skills: Wiki Writing; Evaluating the Work of Other Writers [LO-6] Evaluating existing content is a vital step in making improvements to a wiki.

Your task: Find an article on Wikipedia that needs to be updated, corrected, or otherwise improved. You can use an article that has been flagged by Wikipedia editors or find an article on a subject you are familiar with, such as the profile of a favorite musical artist. To keep the project at a manageable size, feel free to select a portion of a longer article (roughly 500 to 1,000 words). Using the guidelines on page 163 for evaluating the work of other writers, evaluate the quality of the article and identify the steps you would take to improve it. Revise the piece and post your version on your class blog or email it to your instructor. Include a brief summary of the changes you made and your reasons for making them. (Do not edit the Wikipedia entry as part of this assignment.)

Five-Minute Guide to Better Blog Posts

Launch your blog posts on a clear path by checking off these five steps. Doing so will let you know if you're ready to write and post or if you need more time for research and planning.

00:01

Plan the post

1. Make sure each post is within the overall scope you have in mind for your blog.
2. Make every post about your readers and the issues important to them; even if you're sharing news about yourself or your company, relate it to reader needs and interests.
3. Don't post anything you wouldn't want the entire world to see; people far beyond your usual audience may see what you post.

00:02

Draft the post

1. Communicate with a personal style and an authentic voice, but don't write carelessly.
2. Write "professional-grade" material by following accepted standards of capitalization, punctuation, spelling, and grammar.
3. Make sure you support any claims and opinions with logic and verifiable evidence; link to your sources whenever possible.
4. Disclose any relevant business relationships or conflicts of interest, such as explaining that the product you are reviewing was provided by the company free of charge.
5. Keep marketing and sales messages to a minimum, except for the occasional new product announcement, if relevant.
6. Include media items that your readers will find interesting, such as infographics, photos, and videos.
7. Encourage readers to join the conversation by leaving comments.

00:03

Curate useful, shareable content

1. Link generously, but thoughtfully; you have a responsibility to share useful and safe content.
2. Respect the intellectual property rights of anyone whose material you use or link to.
3. Always identify sources of material that you quote.
4. Never copy and repost an entire article from someone else—include a brief introductory portion and link to the original site instead.

00:04

Write compelling, informative, and specific headlines

1. Be clear; readers shouldn't have to guess what the post is about.
2. Use key words from the post to identify the content.
3. Creative phrasing is fine as long as the purpose and content of the post is clear.

00:05

Finalize and format the post for fast, easy reading

1. Revise the post for maximum clarity and conciseness.
2. Proofread to eliminate errors.
3. Double-check facts and figures.
4. Highlight tweetable passages that readers might want to share with their followers.
5. Tag the post with a consistent set of labels that you use for all your posts.
6. Use your blogging system's preview function, if available, to verify formatting and appearance before you hit Publish.

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9 Visual Media

LEARNING OBJECTIVES

After studying this chapter, you will be able to

1. Explain the power of business images, discuss six principles of graphic design that help ensure effective visuals, and explain how to avoid ethical lapses when using visuals.
2. Explain how to choose which points in your message to illustrate.
3. Describe the most common options for presenting data in a visual format.
4. Describe the most common options for presenting information, concepts, and ideas.
5. Explain how to integrate visuals with text, and list three criteria to review in order to verify the quality of your visuals.
6. Identify the most important considerations in the preproduction, production, and postproduction stages of producing business videos.



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Tableau Software CEO Adam Selipsky guides the company's efforts to make data visualization accessible for all business professionals.

COMMUNICATION CLOSE-UP AT
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In some important ways, the business of modern business is data, which in a broad sense includes everything from sensor readings and financial transactions to photographs and Twitter messages. Consumers generate data constantly. Online shopping, mobile app usage, package deliveries, Instagram posts, mass transit rides, phone calls—virtually every time you interact with any kind of technology, you generate data. Meanwhile, businesses also generate data in everything they do, and the billions of devices attached to the internet are constantly adding to the pile as well.

As a result of all this data generation, today's companies can deal with massive data sets, which are often referred to as *big data* (frequently capitalized as *Big Data*). To gain insight into sales trends, for instance, the retail giant Walmart analyzes data from 200 separate sources, including transactions from its stores and websites, consumers' social media posts, weather, gas prices, and economic data. When the company's business analysts want to dig into sales trends, for instance, the system they use can handle billions of transactions at once. (You'll often hear the term *analytics* applied to working with big data, and various functional specialties within a company can use tools adapted to their specific needs, such as *workforce analytics, marketing analytics*, and so on.)

In addition to the challenge of analyzing so many data points, big data also presents a significant communication challenge. These massive data collections are of value only if managers and other decision-makers can gain helpful insights from the numbers. For many professionals, the solution to this communication challenge is a set of software tools known as *data visualization*—literally the ability to visualize data.

If you have ever made a pie chart or a bar graph, you have conducted data visualization in its simplest form, and these basic tools remain an important part of data-driven communication. And you're probably familiar with the charting tools in Excel or another spreadsheet. Spreadsheets have powerful tools for charts and graphs, but going beyond basic capabilities, including creating the ability to interactively explore the underlying data, can be challenging for all but expert users.

Making visualization easy for everyone is one of the chief goals of Seattle-based Tableau Software. Professionals and managers at tens of thousands of companies use Tableau's interactive data visualization tools to enhance communication and support decision-making in virtually every business function. Tableau aims to make it easy for anyone to spot trends and

patterns, identify *outliers* (data points that don't fit a pattern), explore data sets from every possible angle, and communicate their insights with others.[1]

As you'll read in this chapter, data visualization is part of the broader realm of visual communication, which includes illustrations, maps, photos, and videos, in addition to many types of data displays. Whether you are working with data, abstract ideas, storytelling narratives, or just any other type of content, visual communication is an important skill that will boost your career at every stage.

Understanding Visual Communication

1 LEARNING OBJECTIVE

Explain the power of business images, discuss six principles of graphic design that help ensure effective visuals, and explain how to avoid ethical lapses when using visuals.

As the many thousands of professionals who rely on Tableau (profiled in the chapter-opening Communication Close-Up) can attest, visual communication has become an essential technique in business today. This chapter is designed to help you appreciate the power of images and the visual evolution of business communication. It explains how to identify which points in your messages to illustrate; how to select the best visual for each of those points; how to create effective visuals in any medium, from memos to reports to webpages to presentations; and how to produce basic business videos.

THE POWER OF IMAGES

Well-designed visual elements can enhance the communication power of textual messages and, in some instances, even replace them. Visuals can often convey some message points (such as spatial relationships, correlations, procedures, and emotions) more effectively and more efficiently than words. In general, in a given amount of time, effective images can convey much more information than text.[2] In the numbers-oriented world of work, people rely heavily on trend lines, distribution curves, and other visual presentations of numeric quantities. Visuals attract and hold people's attention, helping your audience understand and remember your message. Busy readers often jump to visuals to try to get the gist of a message, and attractive visuals can draw readers more deeply into your reports and presentations. Using pictures is also an effective way to communicate with the diverse audiences that are common in today's business environment.

In addition to their direct information value, visuals often convey connotative meaning as well. As you read in Chapter 5, many words and phrases carry connotative meanings, which are all the mental images, emotions, and other impressions that the word or phrase evokes in audience members. A significant part of the power—and risk—of visual elements derives from their connotative meanings. Even something as simple as a watermark symbol embedded in letterhead stationery can boost reader confidence in the message printed on the paper.[3] Many colors, shapes, and other design elements carry **visual symbolism**, and their symbolic, connotative meaning can evolve over time and mean different things in different cultures (see Figure 9.1). Being aware of these symbolic meanings and using them to your advantage are important aspects of being an effective business communicator.

Visual symbolism is the connotative meaning that visual elements and design can have in various cultures.

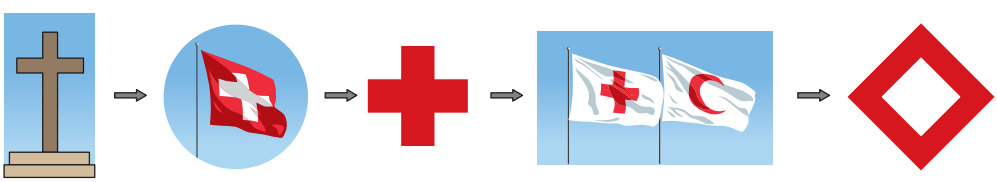


Figure 9.1 Visual Symbolism

A red cross (with equal-length arms) on a white background is the well-known symbol of the Red Cross relief organization. It is also used to indicate the medical branches of many nations' military services. The red cross symbol is based on the flag of Switzerland (where the first Red Cross organization was formed), which over the course of hundreds of years developed from battle flags that originally used the Christian cross symbol. Although the Red Cross emblem is not based directly on the Christian symbol, the organization uses a red crescent in countries where Islam is the dominant religion and is known as the Red Crescent. To avoid any association with religious symbols, the International Federation of Red Cross and Red Crescent Societies (the global umbrella organization for all national Red Cross and Red Crescent organizations) adopted the Red Crystal as its new symbol.

INTELLIGENT COMMUNICATION TECHNOLOGY

Augmented Reality and Virtual Reality

Augmented reality (AR) and virtual reality (VR) are two intriguing technologies that are starting to change the way employees perform a variety of communication-related tasks, from training to research and development to customer service.

AR provides a layer of digital information to enhance the immediate physical reality a person sees. This information can be as simple as text that displays on a mobile or wearable device pointed at a location or an item, or as elaborate as 3D graphics that overlay whatever live scene the user is looking at through a device. For example, AR in training situations can guide trainees step by step, combining virtual and real parts and systems. And rather than forcing trainees to look away to read training manuals, AR systems can project instructions into the air directly in front of users or onto work surfaces. AR applications, such as the Panasonic system shown on page 20, display information whenever a technician aims the camera of a mobile device at a machine. Some AR systems can also be equipped with two-way communication so that techs in the field can get real-time guidance from experts in a central control center.

In contrast, virtual reality (VR) creates a simulation in which the person experiences the sensation of being in an environment, even though that environment is entirely computer-generated. VR is being used in applications ranging from product design to shopping to training. For example, Walmart uses VR to immerse employees in situations such as holiday crowds so they can practice dealing with multiple customers in a high-pressure situation. VR training is particularly valuable when it's dangerous or expensive to put trainees in real-life situations, such as on oil rigs or in operating rooms.[6]

WHAT'S YOUR TAKE?

1. Have you used a VR headset for gaming? If so, did you experience any drawbacks that business users should be aware of?
2. How might the rapid growth of VR in gaming affect the application of VR to business challenges?

For visuals to be effective, they must be carefully planned, competently created, and seamlessly integrated with text. An awkward sentence or grammatical error deep within a report might not be noticed by many readers, but a poorly chosen or clumsily implemented visual will be noticed by most—and can confuse or alienate audiences and damage your credibility. You don't need to be a professional designer to create good visuals, but you do need to be aware of some basic design principles if you want to avoid making highly visible mistakes. This chapter gives you enough background to begin creating your own business visuals, and with some practice you'll be able to craft effective visuals for nearly any communication project you might encounter.

THE VISUAL EVOLUTION IN BUSINESS COMMUNICATION

Several technological and social factors are contributing to the increasing use and importance of visuals in business communication. The process of creating and working with visual elements used to be the domain of experts with complex and expensive tools. Digital technology has changed this situation dramatically. Inexpensive digital cameras and smartphones can produce high-quality images and video, and the software needed to create diagrams, process photos, edit video, and prepare other visual elements continues to get both easier to use and more powerful all the time.

Thanks to advances in technology and changing audience expectations, business communication is becoming more visual.

While technology has been putting visual design and production into the hands of everyday business communicators in recent years, audience skills and expectations have been evolving as well. Two changes in particular could affect your communication efforts in the coming years. First, U.S. government research indicates that only half of the adult population in the United States has the literacy skills considered necessary for success in today's workplace.[4] In other words, depending on the nature of your work, you could find yourself communicating with audiences whose skills could prevent them from successfully reading your documents. Visuals could play a vital role in communicating with these audiences. Second, because technology has multiplied the ways in which communicators can create visuals, and as people grow up and live in a more visual, media-saturated environment, audiences are likely to expect messages to be more visual.

Visual literacy is the ability to create and interpret visuals successfully.

As a result of these changes in both the tools and the communication environment, **visual literacy**—the ability to create effective images and to correctly interpret such images—has become a key business skill.[5] Whether you are using visuals to reach an audience with limited reading skills or to magnify the impact of your written messages, knowing how to help your audience see what you see will enable you to become a more effective communicator.

VISUAL DESIGN PRINCIPLES

Creating effective visuals requires basic knowledge of the principles of good design.

Just as creating effective sentences and paragraphs requires working knowledge of the principles of good writing, creating effective visuals requires some knowledge of the principles of good design. Even though few businesspeople have the opportunity to formally study the "language" of line, mass, space, size, color, pattern, and texture, anyone can learn enough of the basic concepts to craft effective basic visuals.

When you encounter visuals that you find appealing or unappealing, effective or ineffective, stop and ask yourself what caused your response. Did a design grab you and practically force you to pay attention, or did you pass right by with hardly a notice? Did one chart reveal its information quickly and easily, while another made you spend time decoding its confusing message? Did one photo appeal to you at an emotional level and therefore draw you into a document, whereas another was off-putting and caused you to lose interest? By thinking about your own reactions to visual designs, you can become a more effective designer yourself.

As you consider your reactions to various designs and create designs of your own, you'll begin to see how six fundamental principles help distinguish ineffective and effective designs:

- **Consistency**. Audiences view a series of visuals as a whole and assume that design elements will be consistent from one page to the next. Think of consistency as *visual parallelism*, in the same way that textual parallelism helps audiences understand and compare a series of ideas.[7] You can achieve visual parallelism in a variety of ways, including through consistent use of color, shape, size, texture, position, scale, or typeface.
- **Contrast.** To emphasize differences, depict items in contrasting colors, shapes, or sizes. For example, to highlight the difference between two quantities in a chart, don't use two shades of blue; instead, use blue for one and yellow or some other dramatically contrasting color for the other.
- **Balance.** Balance can be either *formal*, in which the elements in the images are arranged symmetrically around a central point or axis, or *informal*, in which elements are not distributed evenly, but rather stronger and weaker elements are arranged in a way that achieves an overall effect of balance. A common approach to informal balance is weighing one visually dominant element against several smaller or weaker elements.[8] In general, formal balance is more calming and serious, whereas informal balance tends to seem more dynamic and engaging.
- **Emphasis.** Audiences usually assume that the dominant element in a design is the most important, so make sure the visually dominant element really does represent the most important information. You can do so through color, position, size, or placement, for example. Conversely, be sure to visually downplay less important items. For instance, avoid using strong colors for minor support points, and deemphasize background features such as the grid lines on a chart.

Nearly every aspect of visual design is governed by conventions that shape audience expectations.

- **Convention.** Visual communication is guided by a variety of generally accepted rules or conventions, just as written communication is guided by spelling, grammar, punctuation, and usage conventions. These conventions dictate virtually every aspect of design.[9] Moreover, many conventions are so ingrained that people don't even realize they are following these rules. For example, if English is your native language, you assume that ideas progress across the page from left to right because that's the direction in which English text is written. If you are a native Arabic or Hebrew speaker, however, you might automatically assume that flow on a page or screen is from right to left because that is the direction in which those languages are written. Flouting conventions often causes breakdowns in communication, but in some cases, it can be done to great effect.[10] For instance, flipping an organizational chart upside down to

put the customers at the top, with frontline employees directly beneath them and on down to the chief executive at the bottom, can be an effective way to emphasize that customers come first and that the managers are responsible for supporting employees in their efforts to satisfy customers.

- **Simplicity.** Simple is usually better when it comes to visuals for business communication. Remember that you're conveying information, not expressing your creative flair. Limit the number of colors and design elements, and take care to avoid *chartjunk*, a term coined by the visual communication specialist Edward R. Tufte for decorative elements that clutter documents and potentially confuse readers without adding any relevant information.[11]

THE ETHICS OF VISUAL COMMUNICATION

Remember that the power to communicate with visuals comes with the responsibility to communicate ethically.

Power always comes with responsibility—and the potential power of visuals places an ethical burden on every business communicator. Ethical problems, both intentional and unintentional, can range from photos that play on racial or gender stereotypes, to images that imply cause-and-effect relationships that may not exist, to graphs that distort data (see Figure 9.2 on the next page), to *deepfake* videos that purport to show people doing and saying things they never did or said.

Altering the scale of items in a visual is just one of many ways to emphasize or deemphasize certain aspects of information. For example, to increase the perceived size of a product, an advertiser might show a close-up of it being held by someone with smaller-than-average hands. Conversely, a large hand would make the product seem smaller.

You can work to avoid ethical lapses in your visuals by following these guidelines:[12]

You can take many steps to emphasize or deemphasize specific elements in your visuals, but make sure you don't inadvertently commit an ethical lapse while doing so.

- **Consider all possible interpretations—and misinterpretations.** Try to view your visuals from your audience members' perspective. Will their biases, beliefs, or backgrounds lead them to different conclusions than you've intended? For instance, assume you want to show how easy your product is to use, and the photograph you've chosen just happens to show an older person operating the product. Will anyone conclude that what you really mean to say is that your product is so simple that "even an old person can use it"?

Visuals can't always speak for themselves; make sure your audience has enough context to interpret your visuals correctly.

- **Provide context.** Even when they are completely accurate, visuals can show only a partial view of reality. Part of your responsibility as a communicator is to provide not only accurate visuals but enough background information to help audiences interpret the visual correctly.
- **Don't hide or minimize negative information that runs counter to your argument.** Obscuring information prevents your audiences from making fully informed decisions regarding your content.
- **Don't exaggerate information that supports your argument.** Similarly, you have a responsibility not to oversell information in support of your argument. You should also resist the temptation to alter or enhance photographs and other images to support your arguments.
- **Don't oversimplify complex situations.** By their very nature, visuals tend to present simplified views of reality. This is usually a benefit and one of the key reasons for using visuals. However, take care not to mislead an audience by hiding complications that are important to the audience's understanding of the situation.
- **Don't imply cause-and-effect relationships without providing proof that they exist.** For example, if you create a line chart that shows how increasing sales seem to track with increasing advertising expenditures, you can claim a correlation but not necessarily a cause-and-effect relationship between the two. You can claim a causal relationship (meaning that the increase in advertising spending caused the increase in sales) only if you can isolate advertising spending as the *only* factor that can account for the increase in sales.
- **Avoid emotional manipulation or other forms of coercion.** For instance, a photograph of an unhappy child being treated as a social outcast because he or she doesn't own a popular toy could be considered an unethical way to persuade parents to buy that product for their children.

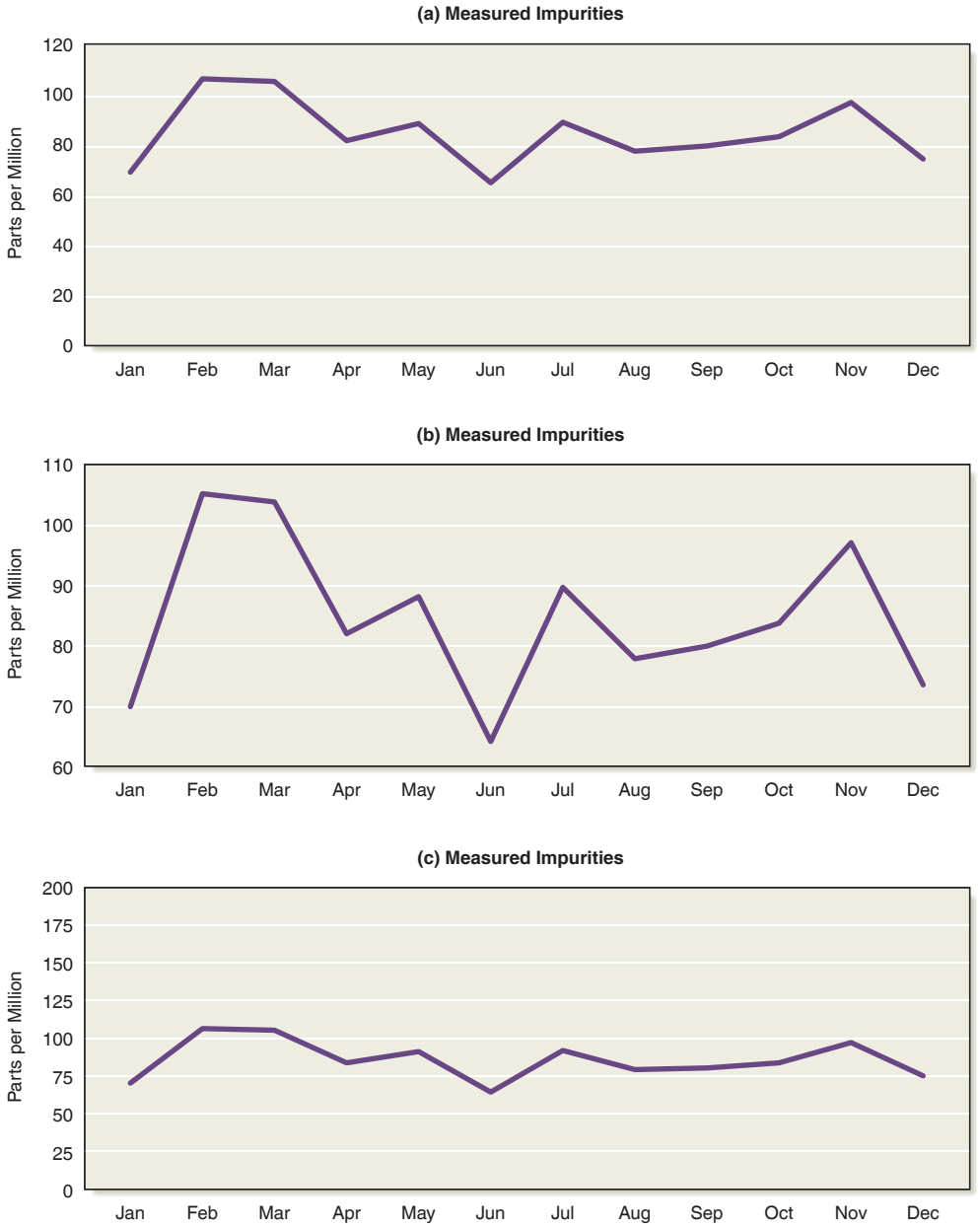


Figure 9.2 Influencing Perception Through Visual Design
Figure 9.2a shows impurities measured over the course of a 12-month period; the vertical scale is set from 0 to 120, enough to cover the range of variations in the data. However, what if you wanted to make the variations from month to month look more severe? Less severe? Figure 9.2b, with the scale "zoomed in" to a narrow range of 60 to 110, makes the variations look much more dramatic. The result could be a stronger emotional impact on the reader, creating the impression that these impurities are out of control. In contrast, Figure 9.2c expands the scale from 0 to 200, which minimizes the appearance of the variations in the data. This graph is visually "calmer," creating the opposite impression—that there's really nothing to worry about. The data shown in all three graphs are identical, but the graphs send three different messages to the reader. Are any of the graphs unethical? That depends on the communicator's intent and whether it inhibits the audience's ability to make informed decisions.

The ways in which you aggregate data for display can affect the messages and meanings that your audience extracts from your visuals.

- **Be careful with the way you aggregate data.** Preparing charts, graphs, and tables that present data often involves decisions about *aggregating*, or grouping, data. Such decisions can have a profound effect on the message your audience receives (see "Ethics Detective: Solving the Case of the Hidden Numbers"). For example, if you aggregate daily production levels to show only a single data point for each week, you might be obscuring important variations that happen from day to day.

ETHICS DETECTIVE

Solving the Case of the Hidden Numbers

You've been assigned to present the results of an industry-wide study of the effects of insecticides. Your audience consists of the department heads in your company, whose experience and educational backgrounds vary widely, from chemical engineering to insurance to law. You're convinced you need to keep your report as simple and as jargon-free as possible.

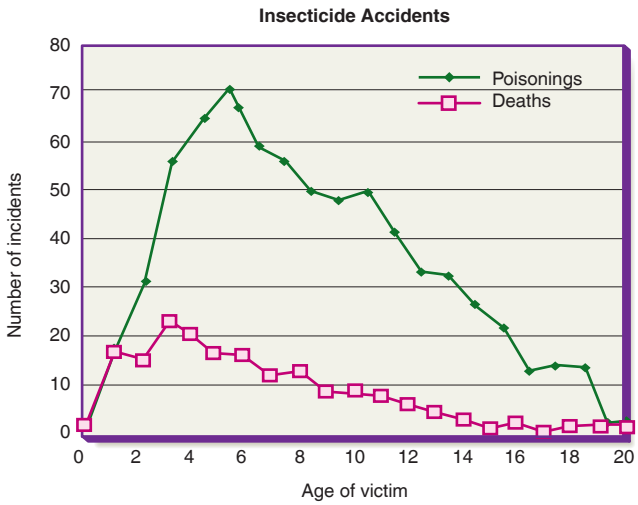
You're not a scientific expert on insecticides, but your supervisor has introduced you to a scientist who works for a trade association that represents chemical producers, including your firm. The scientist is familiar with the study you'll be reporting on, and she has experience in communicating technical subjects to diverse audiences. You jumped at the chance to have such a knowledgeable person review your presentation for technical accuracy, but you're uncomfortable with some of her feedback. In particular, you question her advice to replace the line chart shown here, which displays the number of insecticide poisonings and deaths by age.

The scientist suggests that this chart is too busy and too difficult for nonspecialists to understand. As an alternative, she provides this bar chart that selects four specific ages from the entire range. She says this chart communicates the same basic idea as the line chart but is much easier to read.

ANALYSIS

You agree with the scientist that the line chart is visually busy and takes more effort to process, but something bothers you about the bar chart. Does it present the insecticide situation accurately and honestly? Why or why not?





Identifying Points to Illustrate

2 LEARNING OBJECTIVE

Explain how to choose which points in your message to illustrate.

To identify which parts of your message can benefit from visuals, step back and consider the flow of your message from the audience's point of view. Which parts of the message are likely to seem complex, open to misinterpretation, or even just a bit dull? Are there any connections between ideas that might not be obvious if they are addressed only in the text? Are there a lot of numeric data or other discrete factual content that would be difficult to read if presented in paragraph form? Is there a chance that the main idea won't "jump off the page" if it's covered only in the text?

If you answer yes to any of these questions, you probably need one or more visuals. When you're deciding which points to present visually, think of the five Cs:

Effective visuals are clear, complete, concise, connected, and compelling.

- **Clear.** The human mind is extremely adept at processing visual information, whether it's something as simple as the shape of a stop sign or as complicated as the floor plan for a new factory. If you're having difficultly conveying an idea in words, consider whether a visual element will do the job instead.
- **Complete.** Visuals, particularly tables, often serve to provide the supporting details for a main idea or recommendation. A table or other visual can provide these details without getting in the way of your main message.

TABLE 9.1 When to Use Visuals

Purpose	Application
To clarify	Support text descriptions of "graphic" topics: quantitative or numeric information, explanations of trends, descriptions.
To simplify	Divide complicated descriptions into components that can be depicted with conceptual models, flowcharts, organization charts, or diagrams.
To emphasize	Call attention to particularly important points by illustrating them with line, bar, and pie charts.
To summarize	Review major points in the narrative by providing a chart or table that sums up the data.
To reinforce	Present information in visual form to supplement descriptions in text.
To attract	Make material seem more interesting by decorating the cover or title page and by breaking up the text with visual aids.
To impress	Build confidence by using visual forms to convey authenticity and precision.
To unify	Depict the relationships among various elements of a whole.

- **Concise.** You've probably heard the expression "A picture is worth a thousand words." If a section of your message seems to require extensive description or explanation, see if you can convey this information visually. With a picture working in conjunction with text, you may be able to reduce your word count considerably.
- **Connected.** A key purpose of many business messages is showing connections—similarities or differences, correlations, cause-and-effect relationships, and so on. Whenever you want readers to see such a connection, consider a chart, diagram, or other illustration.
- **Compelling.** Will one or more illustrations make your message more persuasive, more interesting, or more likely to get read? You rarely want to insert visuals simply for decorative purposes, of course, but even if a point can be expressed equally well via text or visuals, consider adding the visual to make your report or presentation more inviting and persuasive.

As you identify which points in your document would benefit from a visual, make sure that each visual you decide on has a clear purpose (see Table 9.1).

Selecting Visuals for Presenting Data

3 LEARNING OBJECTIVE
Describe the most common options for presenting data in a visual format.

After you have identified which points would benefit most from visual presentation, your next decision is choosing which type of visual to use for each message point. As you can see in Table 9.2, you have many choices for business graphics, which can be roughly divided into those for presenting data and those for presenting information, concepts, and ideas.

For some content, the decision is usually obvious. For example, to present a large set of numeric values or detailed textual information, a table is often the obvious choice. However, if you're presenting data broken down geographically, a color-coded map might be more effective, showing overall patterns rather than individual data points. Also, certain visuals are used more commonly for certain applications, as you'll see in the following sections.

Business professionals have many choices for presenting data, from general-purpose line, bar, and pie charts to specialized charts for product portfolios, financial analysis, and other professional functions. (Note that most people use the terms *chart* and *graph* interchangeably.)

TABLES

When you need to present a large number of specific data points or pieces of information, a table is often the best choice. Tables are ideal when your audience needs information that would be either difficult or tedious to handle in the main text.

TABLE 9.2 Selecting the Best Visual

Communication Challenge	Effective Visual Choice
Presenting Data	
To present individual, exact values	Table
To show trends in one or more variables, or the relationship between those variables, over time	Line chart, bar chart
To compare two or more sets of data	Bar chart, line chart
To compare several entities or alternatives using multiple data variables	Bubble chart, radar diagram
To show frequency or distribution of parts in a whole	Pie chart, bar chart
To show massive data sets, complex quantities, or dynamic data	Data visualization
Presenting Information, Concepts, and Ideas	
To show geographic relationships or comparisons	Map, geographic information system
To illustrate processes or procedures	Flowchart, diagram
To show conceptual or spatial relationships (simplified)	Illustration
To tell a data-driven story visually	Infographic
To show (realistic) spatial relationships	Photograph
To show processes, transformations, and other activities	Animation, video

Most tables contain the standard parts illustrated in Figure 9.3. Every table includes vertical columns and horizontal rows, with useful headings along the top and side. For printed documents, you can adjust font size and column and row spacing to fit a considerable amount of information on the page and still maintain readability. For online documents, you may need to reduce the number of columns and rows to make sure your tables are easily readable, particularly on mobile devices. If you can't simplify a table enough to make it easily readable, provide the full table as a downloadable PDF. If you want to give the audience the opportunity to manipulate the table's content, you can provide it as a live spreadsheet. Tables for presentation slides usually need to be the simplest of all because you can't expect audiences to read detailed information from the screen.

Printed tables can display extensive amounts of data, but tables for online display and presentation slides need to be simpler.

When you prepare tables, follow these guidelines to make they are easy to read:

- Use common, understandable units and clearly identify which you're using, whether dollars, percentages, price per ton, or some other unit.
- Express all items in a column in the same unit and round off for simplicity whenever doing so won't eliminate essential details.
- Label column headings clearly and use a subheading if necessary.

	Multicolumn Heading			Single-Column Heading
	Column Subheading	Column Subheading	Column Subheading	
Row Heading	xxx	xxx	xxx	xxx
Row Heading	xxx	xxx	xxx	xxx
Row Subheading	xxx	xxx	xxx	xxx
Row Subheading	xxx	xxx	xxx	xxx
Row Heading	xxx	xxx	xxx	xxx
Row Heading	xxx	xxx	xxx	xxx
TOTALS	xxx	xxx	xxx	xxx

Figure 9.3 Parts of a Table
Here are the typical parts of a table. No matter which design you choose, make sure the layout is clear and the individual rows and columns are easy to follow.

- Separate columns or rows with lines or extra space to make the table easy to follow; in complex tables, consider highlighting every other row or column in a pale, contrasting color. (Word-processing and spreadsheet apps can do this for you automatically.)
- Provide totals or averages of columns or rows when relevant.
- Document the source of the data, using the same format as a text footnote (see Appendix B).

Tables can contain numerals, text, symbols, or other facts and figures. Text tables are particularly appropriate for presenting survey findings or for comparing various items against a specific standard.

LINE AND SURFACE CHARTS

A *line chart* illustrates trends over time or plots the relationship of two or more variables.

A **line chart** illustrates trends over time or plots the relationship of two or more variables. In line charts showing trends, the vertical axis—or *y*-axis—shows the amount, and the horizontal axis, or *x*-axis, shows the time or other quantity against which the amount is being measured. Both axes often start at zero in the lower left corner, but you can exercise a fair amount of flexibility with both axes to present your data as clearly as possible. For instance, to show both positive and negative values (such as profit and loss), you can have the *y*-axis span from a negative value up to a positive value, with zero somewhere in between. Of course, you should always avoid distorting the data in ways that could mislead your audience, as noted in the section "The Ethics of Visual Communication" on pages 251–252.

If you need to compare two or more sets of data, you can plot them on the same chart for instant visual comparison (see Figure 9.4). Two or three lines on a single chart are usually easy to read, but beyond that, things can get confusing, particularly if the lines cross.

Because they usually show the behavior of one or more variables in the past, line charts often raise the question "What will happen in the future?" For instance, if you present sales data for the past 12 months, your audience may well ask what you think will happen in the next 12 months. Predicting the future is always risky, but you can use a spreadsheet's forecasting tool to extend a line into the future, using a statistical technique known as *regression analysis*. Check the program's Help function for more information on using its *linear regression*, *trend line*, or *forecasting* functions. When using these tools, be aware that all they can do is extract patterns from the data you provide and extend them into the future. They don't have any awareness of the "real-life" factors that shaped the past data and that will shape the future data.

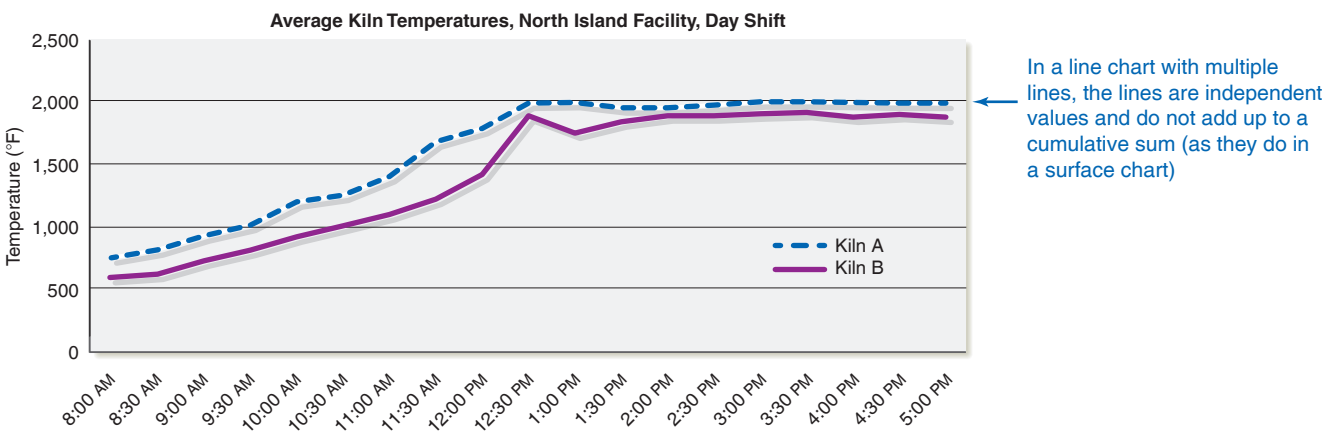
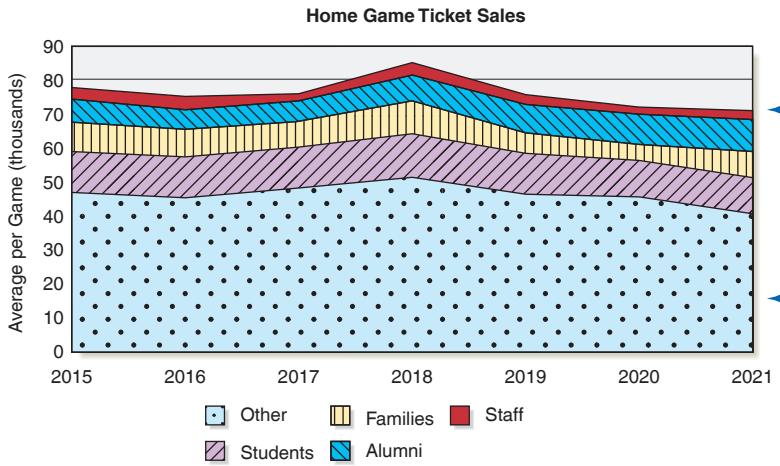


Figure 9.4 Line Chart
This two-line chart compares the temperatures measured inside two cement kilns every half hour from 8:00 A.M. to 5:00 P.M.



Unlike a line chart, in which the values are independent, the lines in a surface chart add up to a single total represented by the top of the "stack." The contrasting colors indicate the relative contribution of each value.

This chart uses textures in addition to colors to distinguish the layers in the charts. This extra visual cue helps readers who have difficulty distinguishing certain colors.

Figure 9.5 Surface Chart
Surface or area charts can show a combination of trends over time and the individual contributions of the components of a whole.

A **surface chart**, also called an *area chart*, is a form of line chart with a cumulative effect; all the lines add up to the top line, which represents the total (see Figure 9.5). This presentation helps you illustrate changes in the composition of something over time, such as how sales to individual market segments contribute to overall sales.

A *surface chart* is a form of line chart in which multiple lines add up to the top line total.

BAR CHARTS, PICTOGRAMS, AND GANTT CHARTS

A **bar chart** portrays quantities by the height or length of its rectangular bars, making a series of numbers easy to read or understand. (Vertical bar charts are sometimes called *column charts*.) Bar charts are particularly valuable when you want to

A *bar chart* portrays quantities by the height or length of its rectangular bars.

- Compare the sizes of several items at one time
- Show changes in one item over time
- Indicate the composition of several items over time
- Show the relative sizes of components of a whole

As the charts in Figure 9.6 (see next page) show, the bar chart is a versatile tool that can serve many purposes. *Grouped* bar charts compare more than one set of data, using a different color or pattern for each set. *Deviation* bar charts identify positive and negative values, or winners and losers. *Segmented* bar charts, also known as *stacked* bar charts, show how individual components contribute to a total number, using a different color or pattern for each component. *Combination* bar and line charts compare quantities that require different units or intervals. *Paired* bar charts can highlight the differences between two variables.

Figure 9.6 also suggests how creative you can be with bar charts. You might align the bars either vertically or horizontally, or you might use bar charts to show both positive and negative quantities. No matter what you do, however, be sure to space the bars evenly and place them in a logical order, such as chronological or alphabetical.

You can also convert the bars of a bar chart into lines of symbols, so that the number or length of the symbols indicates the relative value of each item. A chart that portrays data as symbols instead of words or numbers is known as a *pictogram*. The chief value of pictograms is their novelty and ability to convey a more literal, visual message, but they can be more difficult to read if not designed with care, and they can present a less professional tone than a straightforward bar chart. Project managers use a specialized bar chart known as a **Gantt chart** to track progress (see Figure 9.7 on page 259).

A *Gantt chart* is a specialized bar chart that helps project managers track progress toward goals.

SCATTER AND BUBBLE DIAGRAMS

If you need to compare several entities (companies, markets, employees, and so on) on two variables, such as revenue and profit margin, use a **scatter diagram**, also known as an *XY diagram*. This diagram is like a line chart in the sense that one variable is

Scatter diagrams compare entities against two variables; *bubble diagrams* compare them against three.

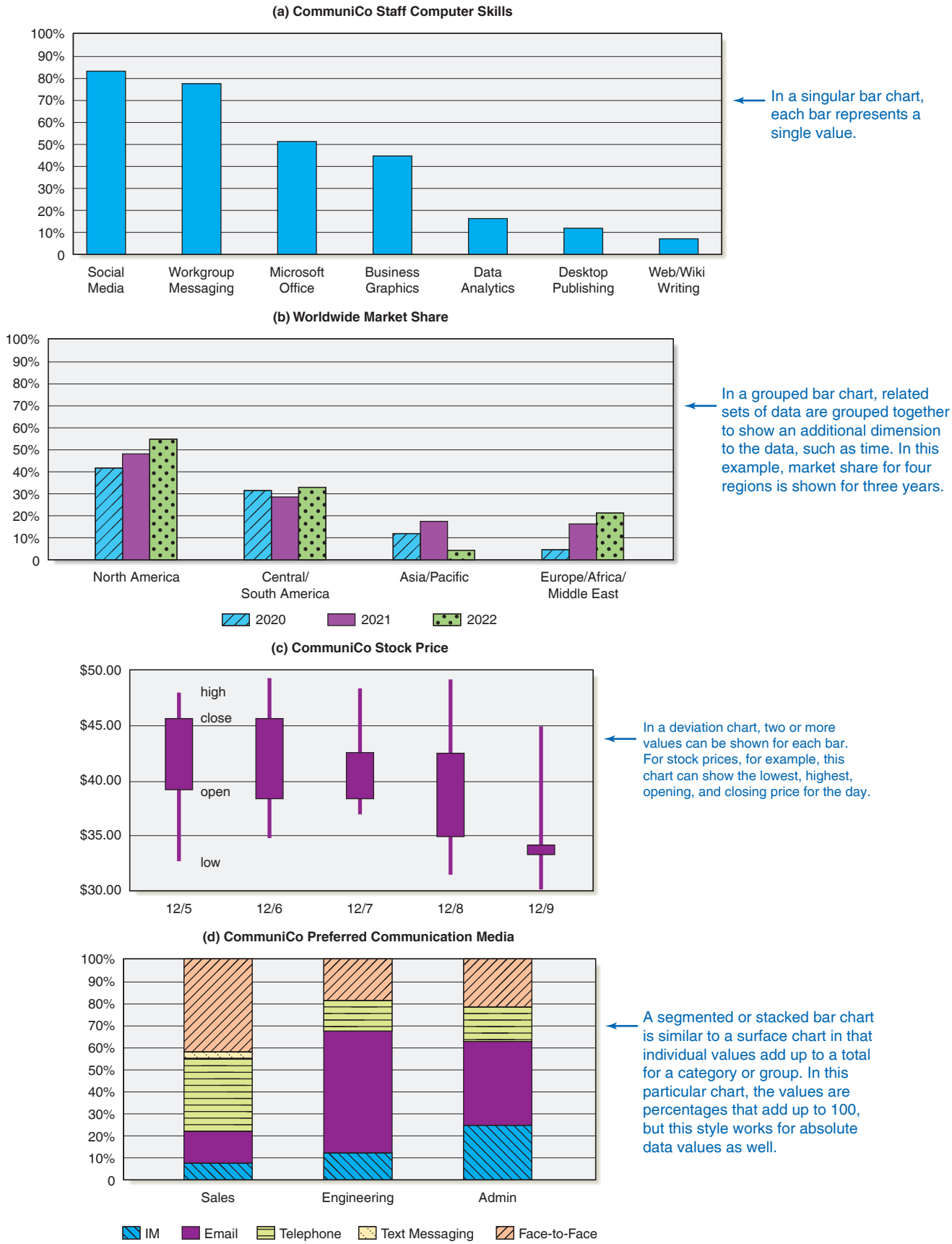


Figure 9.6 Bar Charts
Here are six of the dozens of variations possible with bar charts: singular (a), grouped (b), deviation (c), stacked (d), combination (e), and paired (f). Software packages can use different names for these variations, and vertical bar charts are sometimes referred to as *column charts* to distinguish them from bar charts with horizontal bars.

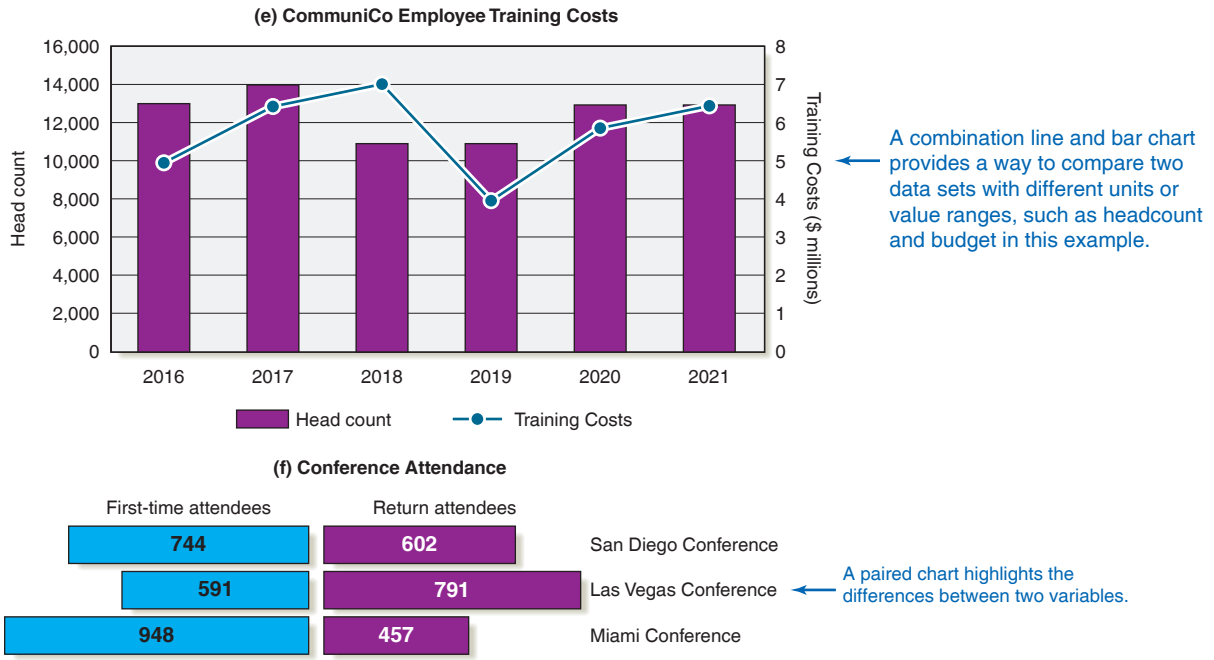


Figure 9.6 **Bar Charts (continued)**

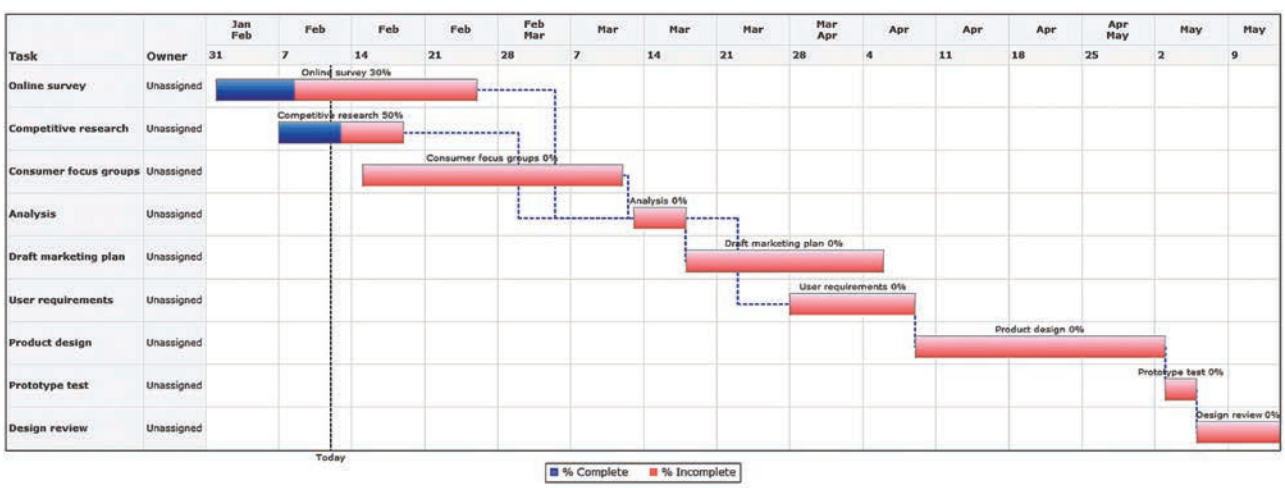


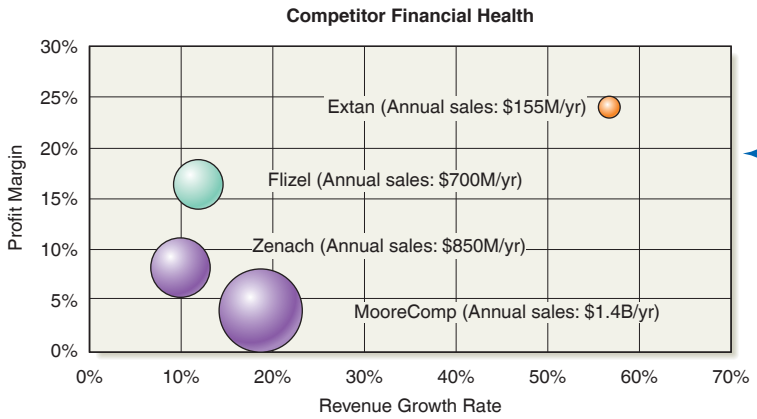
Figure 9.7 **Gantt Chart**
A Gantt chart is a specialized bar chart that uses bars to show durations of tasks and lines to show dependencies between tasks, such as when one task cannot be started before another one is completed.

plotted along the *x* (horizontal) axis and another along the *y* (vertical) axis. In a scatter diagram, however, individual points are plotted, not continuous lines. A **bubble diagram** expands to three variables, with the size of the bubble representing the third variable (see Figure 9.8 on the next page).

RADAR DIAGRAMS

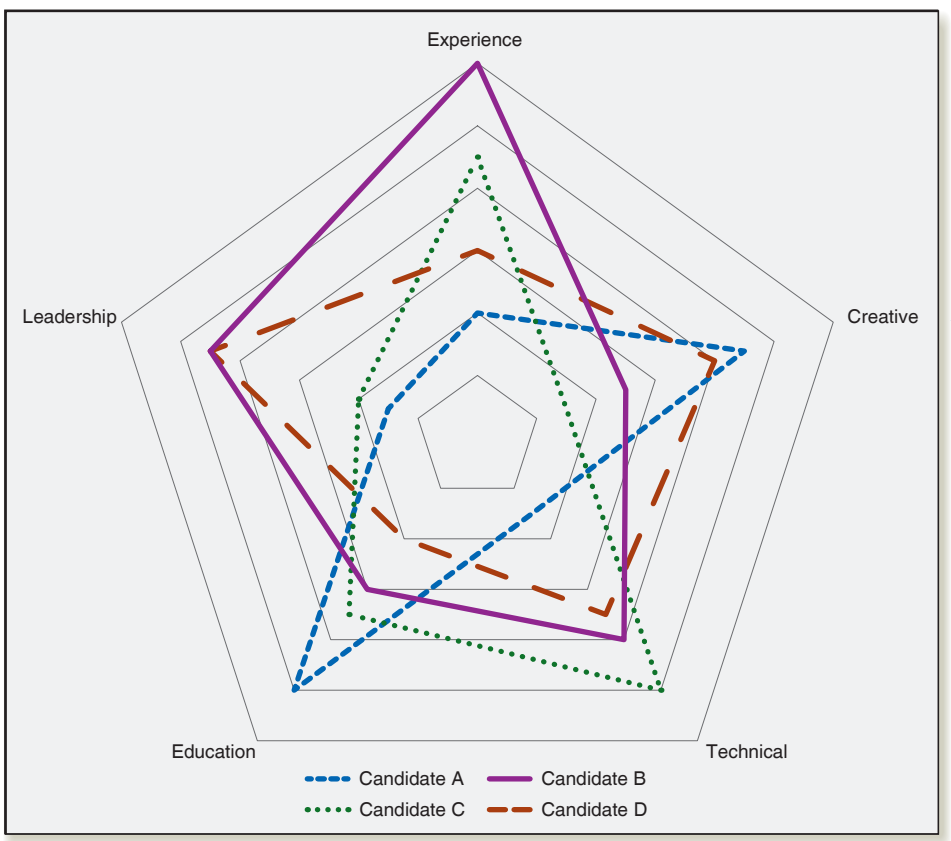
To compare a set of entities or alternatives using three or more variables, you can use a **radar diagram**, which gets its name from its resemblance to a radar screen. (As they also look like spider webs, people sometimes refer to these as *spider diagrams*.) In the example in Figure 9.9 on the next page, four job candidates are compared using the five variables of experience, creative skills, technical skills, education, and leadership ability. Each candidate covers a distinct shape on the diagram, which can help the hiring manager decide who is the best overall fit for the job.

A *radar diagram* compares entities against three or more variables.



A bubble diagram can show three data dimensions for each entity; in this example, the chart shows profit margin (*y*-axis), revenue growth rate (*x*-axis), and annual sales (bubble diameter) for each company.

Figure 9.8 Bubble Diagram
A bubble diagram shows three variables: distance along the *x*- and *y*-axes plus the diameter of each bubble. In this case the rate of revenue growth is plotted on the *x*-axis, profit margin is plotted on the *y*-axis, and the size of the bubbles represents annual revenues. For instance, MooreComp has the greatest revenues but the lowest profit margin, although it is growing faster than two of its three competitors.



By comparing how much total area each candidate covers on the "radar screen," a hiring manager can get a sense of which candidate is the best fit for the position.

In this example, Candidate B is the most complete candidate overall but is relatively weak in terms of creative skills and so might not be the best choice if the position emphasizes that skill.

Figure 9.9 Radar Diagram
Radar diagrams compare entities across multiple variables to give some sense of which entity is the strongest or most complete.

PIE CHARTS

A *pie chart* uses a circular "pie" to show relative sizes of the parts of a whole; pie charts are common, but they are often not as helpful to readers as bar charts and other types of visuals would be.

A **pie chart** uses a circular "pie" to show relative sizes of the parts of a whole. Although pie charts are popular and can quickly highlight the dominant parts of a whole, they are often not as effective as bar charts or tables. For example, comparing percentages accurately is often difficult with a pie chart but can be easy with a bar chart (see Figure 9.10). Making pie charts easier to read can require labeling each slice with data values, in which case a table might serve the purpose more effectively.[13]

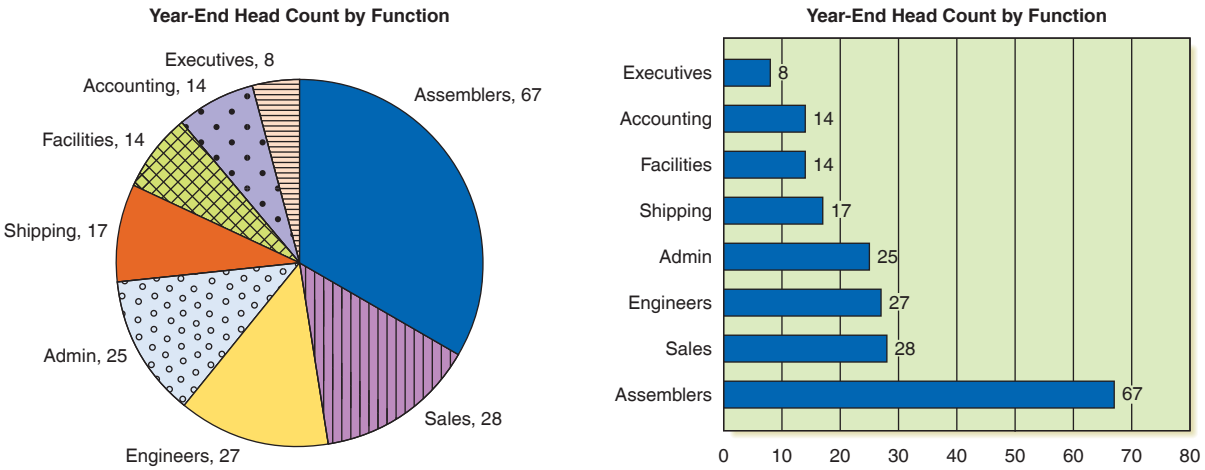


Figure 9.10 Pie Charts Versus Bar Charts
Pie charts are used frequently, but they aren't necessarily the best choice for many data presentations. This pie chart does make it easy to see that assemblers are the largest employee category, but other slice sizes (such as Sales, Engineers, and Admin) are not as easy to compare and require a numerical rather than a visual comparison. In contrast, the bar chart gives a quick visual comparison of every data point.

DATA VISUALIZATION

Conventional charts and graphs are limited in several ways: Most types can show only a limited number of data points before becoming too cluttered to interpret, they often can't show complex relationships among data points, they usually can represent only numeric data, and they aren't interactive. As digital technologies continue to generate large amounts of data that can be combined and connected in endless ways, a diverse class of display capabilities known as **data visualization** work to overcome all these drawbacks. (All charts and graphs help people visualize data, of course, and there is no standard definition of data visualization, so you will see the term applied to wide variety of tools.)

Data visualization is a diverse class of data-display tools designed to be more powerful and more interactive than conventional charts and graphs.

As the Tableau story at the beginning of the chapter describes, data visualization has become an important tool for companies working with huge data sets. Interactive software such as Tableau lets users "drill down" into the data to find details or look at data collections from a variety of perspectives (see Figure 9.11 on the next page).

Selecting Visuals for Presenting Information, Concepts, and Ideas

4 LEARNING OBJECTIVE
Describe the most common options for presenting information, concepts, and ideas.

In addition to facts and figures, you'll need to present other types of information, from spatial relationships to abstract ideas. In these situations professionals often look for visual solutions to complement or even replace textual information. The most common types of visuals for these applications include flowcharts and organization charts; maps; illustrations, diagrams, and photographs; infographics; and video (covered in the final section of the chapter).

FLOWCHARTS AND ORGANIZATION CHARTS

A *flowchart* illustrates a sequence of events from start to finish.

If you need to show physical or conceptual relationships rather than numeric ones, you might want to use a flowchart or an organization chart. A **flowchart** (see Figure 9.12 on the next page) illustrates a sequence of events from start to finish. It is particularly helpful when illustrating processes and procedures in which there are decision points, loops, and other complexities. For general business purposes, you don't need to be too concerned about the specific shapes, although do keep them consistent. However, be aware that there is a formal flowchart "language" in which each shape has a specific meaning (diamonds are decision points, rectangles are process steps, and so on). If you're communicating with

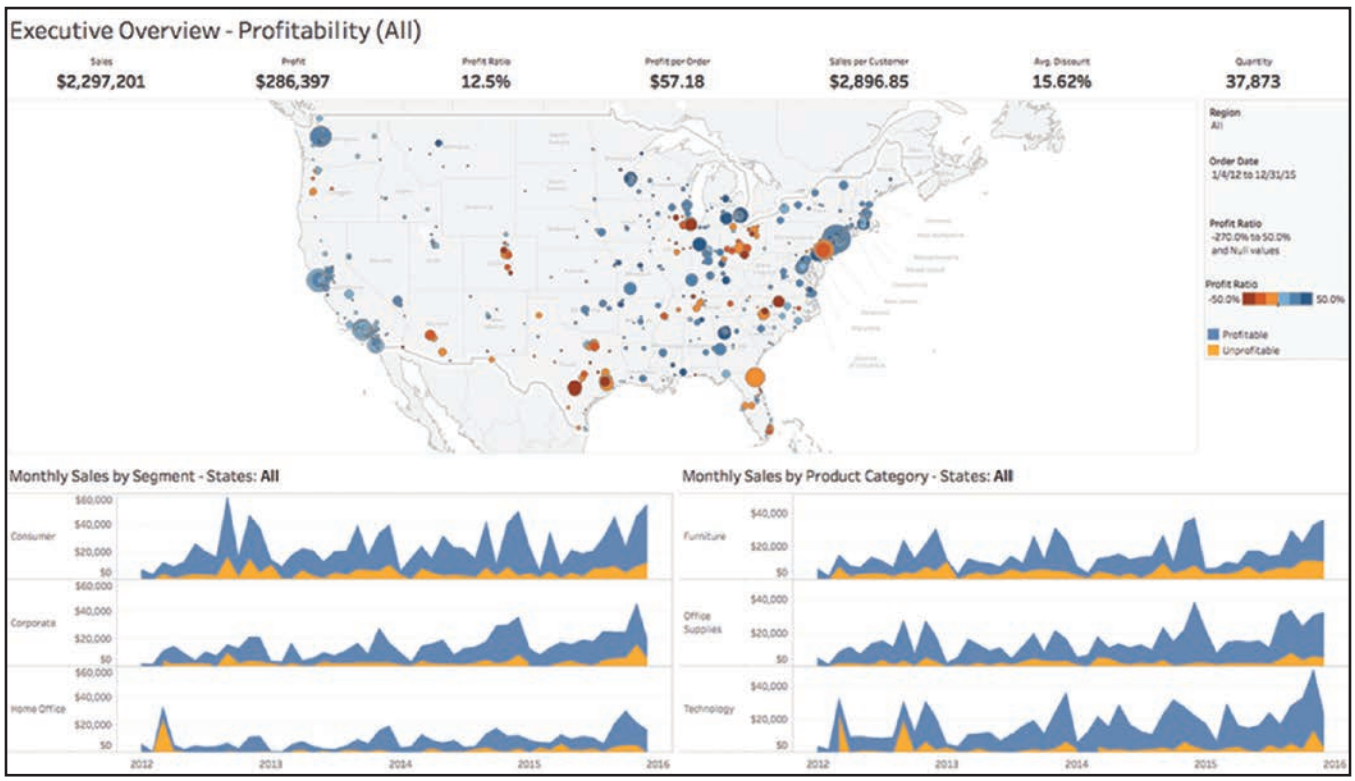


Figure 9.11 Data Visualization
Data visualization displays and software tools take a wide variety of forms. This mobile app from Tableau lets users explore a large data set from different perspectives and at varying levels of detail.

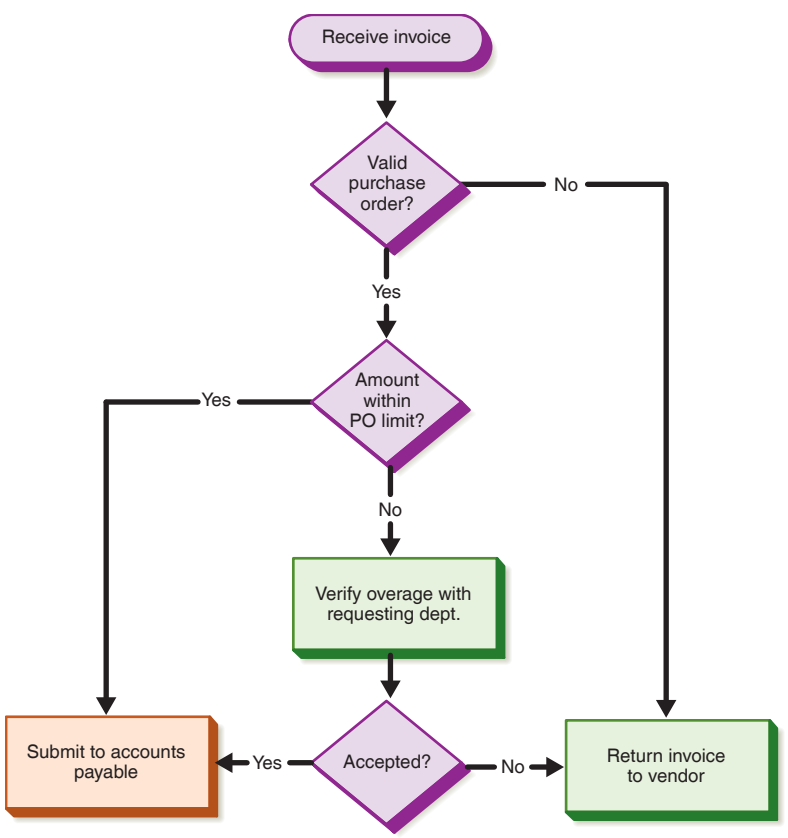


Figure 9.12 Flowchart
Flowcharts show sequences of events and are most valuable when the process or procedure has multiple decision points and variable paths.

computer programmers or others who are accustomed to formal flowcharting, make sure you use the correct symbols to avoid confusion. Graphics programs that have flowchart symbols usually label their functions, making it easy to use the right ones.

As the name implies, an **organization chart** illustrates the positions, units, or functions of an organization and the ways they interrelate. Figure 1.4 on page 9 offers an example.

An *organization chart* depicts the interrelationships among the parts of a whole.

MAPS

Maps can show location, distance, points of interest (such as competitive retail outlets), and geographic distribution of data, such as sales by region or population by state. In addition to presenting facts and figures, maps are useful for showing market territories, distribution routes, and facilities locations.

Use maps for such tasks as representing statistics by geographic area or showing spatial relationships.

When combined with databases and aerial or satellite photography in *geographic information systems (GISs)*, maps become extremely powerful visual reporting tools. As one example, retailing specialists can explore the demographic and psychographic makeup of neighborhoods within various driving distances from a store location. Using such information, managers can plan everything from new building sites to delivery routes to marketing campaigns.

ILLUSTRATIONS, DIAGRAMS, AND PHOTOGRAPHS

The opportunities to use illustrations, diagrams, and photographs are virtually endless. Simple illustrations can show the network of suppliers in an industry, the flow of funds through a company, or the process for completing the payroll each week. More complex diagrams, including interactive online diagrams, can convey technical topics such as the operation of a machine or repair procedures.

Use illustrations and diagrams to show how something works or how it is made or used; illustrations are sometimes better than photographs because they let you focus on the most important details.

Some word-processing and presentation programs now offer sophisticated drawing capabilities, but for more precise and professional illustrations, you may need a specialized package such as Adobe Illustrator or Trimble SketchUp. For more-technical illustrations, *computer-aided design (CAD)* systems, such as Autodesk's AutoCAD, can produce extremely detailed architectural and engineering drawings.

Photographs offer both functional and decorative value, and nothing can top a photograph when you need to show exact appearances. Because audiences expect photographs to show literal visual truths, you must take care when using image-processing tools such as Adobe Photoshop or even the filters available in various photo apps.

Use photographs for visual appeal and to show exact appearances.

To use photographs successfully, consider these guidelines:

- **Consider whether a diagram would be more effective than a photograph.** Sometimes photographs communicate too much information for the purpose at hand. For example, to show how to adjust a one part inside a complicated machine, a photo can be confusing because it shows all the parts within the camera's view. A simplified diagram can be more effective because it allows you to emphasize the specific parts that are relevant to the task.
- **Learn how to use basic image-processing functions.** For most business reports, websites, and presentations, you won't need to worry about advanced functions and special effects. However, you do need to know the difference between such basic operations as resizing (changing the size of an image without removing any parts of it) and cropping (cutting away parts of an image).
- **Make sure the photographs have communication value.** Except for covers, title slides, and other special uses, it's usually best to avoid including photographs simply for decorative value.
- **Be aware of copyrights and model permissions.** As with textual information you find online, you can't simply insert online photographs into your documents. Unless they are specifically offered free, you must assume that someone owns the photos and is entitled to payment or at least a photo credit. In addition, professional photographers are careful to have any person who poses in photos sign a model release form, which gives the photographer permission to use the person's image.

Make sure you have the right to use photographs you find online.

MOBILE APP

Instagram has become wildly popular for personal photos, but many companies use the photo-sharing service for business communication as well.

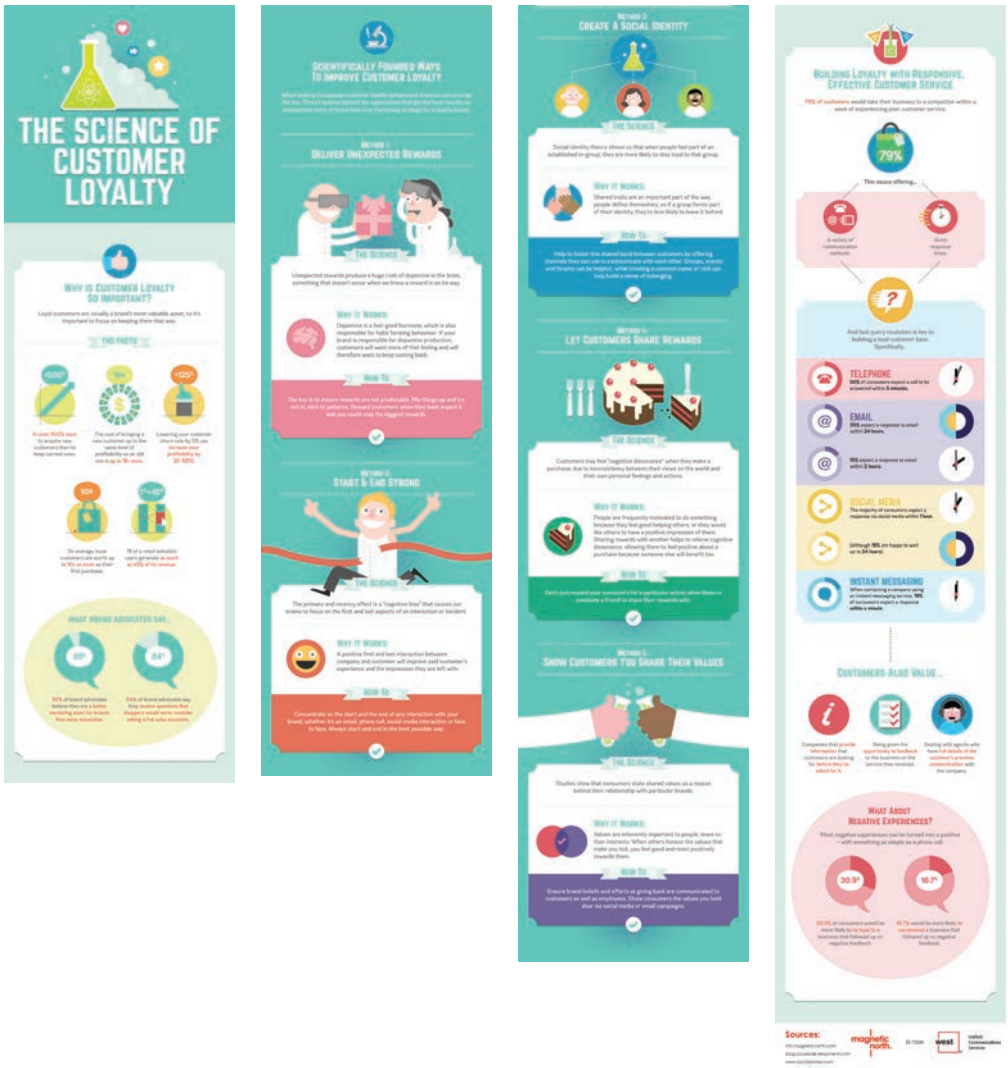


Figure 9.13 Infographics
Infographics are a great way to tell stories with data, as in this infographic on the science behind customer loyalty. (The infographic appears online as a single image.)

INFOGRAPHICS

Infographics are a special class of diagrams that convey both data and concepts or ideas.

Infographics are a special class of diagrams that convey both data and concepts or ideas. In addition, they contain enough visual and textual information to function as independent, standalone documents. Broadly speaking, there are two types of infographics: those that are stylized collections of charts or graphs and those that have a structured narrative. The first type don't necessarily convey any more information than basic charts and graphs would, but their communication value lies in their ability to catch the audience's attention and the ease with which they can be distributed online.

The second type, represented by Figure 9.13, take full advantage of the visual medium to tell stories or show interconnected processes. Such infographics can be powerful communication tools, even to the point of replacing conventional reports.

5 LEARNING OBJECTIVE

Explain how to integrate visuals with text, and list three criteria to review in order to verify the quality of your visuals.

Producing and Integrating Visuals

This section offers advice on creating visuals, integrating them with your text, and verifying the quality of your visual elements.

CREATING VISUALS

Computers make it easy to create visuals, but they also make it easy to create ineffective, distracting, and even downright ugly visuals. By following the design principles discussed on pages 250–251, you can create all the basic visuals you need—and make them both attractive and effective.

MOBILE APP

Graph (Android) and **Chartistic** (iOS) are two of the many apps available for creating charts and graphs on mobile devices.

Whether you're using the charting functions offered in a spreadsheet or the design features of a specialized graphics program, take a few minutes to familiarize yourself with the software's quirks and capabilities. For important visuals, try to have a professional designer create a template for the various types of visuals you and your colleagues need to create. The template should contain a well-coordinated color palette and a set of typefaces to choose from. In addition to helping ensure an effective design, templates eliminate the time required to make numerous design decisions every time you create a chart or graphic.

No matter which tools you're using, take care to match the style and quality of your visuals with the subject matter and the situation at hand. The style of your visuals communicates a subtle message about your relationship with the audience. A simple sketch might be fine for a working meeting but inappropriate for a formal presentation or report. On the other hand, elaborate, full-color visuals may be viewed as extravagant for an informal report but may be entirely appropriate for a message to top management or external stakeholders.

A visual's level of sophistication should match the communication situation.

INTEGRATING VISUALS WITH TEXT

For maximum effectiveness and minimum disruption for the reader, visual elements need to be carefully integrated with the text of your message. In some instances visual elements are somewhat independent from the text, as in the *sidebars* that occasionally accompany magazine articles or *photo essays* such as you see in Chapters 1, 4, and 8 in this textbook. Such images are related to the content of the main story, but they aren't always referred to by a specific title or figure number.

For reports and most other business documents, however, visuals are tightly integrated with the text so that readers can move back and forth between text and visuals with as little disruption as possible. Successful integration involves four decisions: maintaining a balance between visuals and text, referring to visuals in the text, placing the visuals in a document, and writing titles and other descriptions.

Maintaining a Balance Between Illustrations and Words

Strong visuals enhance the descriptive and persuasive power of your writing, but putting too many visuals into a report can distract your readers by requiring them to constantly switch back and forth from words to visuals. The space occupied by visuals can also disrupt the flow of text on the page or screen.

As far as the content allows, maintain a comfortable balance between text and visuals.

As always, consider your readers' needs. If you're addressing an audience with multiple language backgrounds or widely varying reading skills, you can shift the balance toward more visual elements to help get around any language barriers. The professional experience, education, and training of your audience should influence your approach as well. For instance, detailed statistical plots and mathematical formulas are everyday reading material for quality-control engineers but not for most salespeople or top executives.

Make sure your visuals match the needs, expectations, and interpretation skills of your audience.

Referencing Visuals

Unless a visual element clearly stands on its own, it should be referred to by number in the text of your report. Some report writers refer to all visuals as "exhibits" and number them consecutively throughout the report; many others number tables and figures separately (everything that isn't a table is regarded as a figure). In a long report with numbered sections, illustrations may have a double number (separated by a period or a hyphen) representing the section number and the individual illustration number within that section. Whatever scheme you use, make sure it's clear, consistent, and easy to follow.

To tie visuals to text, introduce them in the text and place them near the points they illustrate.

Help your readers understand the significance of visuals by referring to them before readers encounter them in the document or on the screen. The following examples show how you can make this connection in the text:

> Figure 1 summarizes the financial history of the motorcycle division over the past five years, with sales broken into four categories.
>
> Total sales were steady over this period, but the mix of sales by category changed dramatically (see Figure 2).
>
> The underlying reason for the remarkable growth in our sales of youth golf apparel is suggested by Table 4, which shows the growing interest in junior golf around the world.

Help your readers understand why each visual is important.

When describing the data shown in your visuals, be sure to emphasize the main point you are trying to make. Don't make the mistake of simply repeating the data to be shown. Paragraphs that do are guaranteed to put the reader to sleep. The visual will (or at least should) provide all these details; there is no need to repeat them in the text. Instead, use round numbers that sum up the message. For example, you might say, "As Table 4.2 shows, more than two-thirds of the respondents earn less than $20 per hour."

Placing Visuals

Place each visual as close as possible to its in-text reference to help readers understand the illustration's relevance and to minimize the effort of reading.

Try to position your visuals so that your audience won't have to flip back and forth (in printed documents) or scroll (on screen) between the visuals and the text associated with them. Ideally, it's best to place each visual within, beside, or immediately after the paragraph it illustrates so that readers can consult the explanation and the visual at the same time.

As much as possible, avoid bunching several visuals in the same location. (Bunching is unavoidable in some cases, such as when multiple visuals accompany a single section of text—as in this chapter, for instance.) Word-processing, desktop-publishing, and web-design programs or apps let you place graphical elements virtually anywhere you wish, so take advantage of this flexibility.

Writing Titles, Captions, and Legends

A *title* identifies the content and purpose of the visual; a *descriptive title* simply identifies the topic of an illustration whereas an *informative title* helps the reader understand the conclusion to be drawn from the illustration.

Titles, captions, and legends help connect your visual and textual messages and ensure a seamless reading experience. A **title** identifies the content and purpose of the visual, along with whatever label and number you're using to refer to the visual. A *descriptive title* simply identifies the topic of the illustration, whereas an *informative title* calls attention to the conclusion that ought to be drawn from the data. Here's an example of the difference:

Descriptive Title	Informative Title
Relationship Between Petroleum Demand and Refinery Capacity in the United States	Refinery Capacity Declines as Petroleum Demand Continues to Grow

An informative title saves readers the work of interpreting the visual to extract the main idea from it. Regardless of whether your titles and legends are informative or descriptive, phrase them consistently throughout a document.

A *caption* offers additional discussion of a visual's content; a *legend* is a key that helps readers"decode" the visual by explaining what various colors, symbols, or other design choices mean.

A **caption** usually offers additional discussion of a visual's content and can be up to several sentences long, if appropriate. Captions can also alert readers that additional discussion is available in the accompanying text. A **legend** helps readers "decode" the visual by explaining what various colors, symbols, or other design choices mean (several of the figures in this chapter use legends, for example). Legends aren't always necessary for simple graphs, such as a line chart or bar chart with only one series of data, but they are critical with more complex graphics.

VERIFYING THE QUALITY OF YOUR VISUALS

Review each visual to make sure it doesn't intentionally or unintentionally distort the meaning of the underlying information.

Visuals have a particularly strong impact on your readers and on their perceptions of you and your work, so pay attention to quality. Ask yourself three questions about every visual element:

- **Is the visual accurate?** Be sure to check for mistakes such as typographical errors, inconsistent color treatment, confusing or undocumented symbols, and misaligned elements. Also verify that the information in visuals and text matches. For data

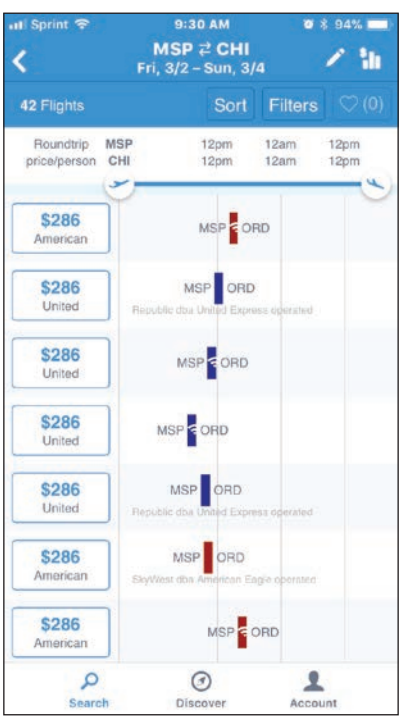
presentations, particularly if you're producing charts using a spreadsheet, verify any formulas used to generate the numbers and make sure you've selected the right numbers for each chart. For all visuals, make sure that each delivers your message accurately and that you have inserted the correct image files.

- **Is the visual properly documented?** As with the textual elements in your reports and presentations, visuals based on other people's research, information, and ideas require full citation. (Even if the graphical design is entirely yours, any underlying information taken from other sources needs to be documented.) Also, try to anticipate any questions or concerns your audience may have and address them with additional information, as needed. For instance, if you're presenting the results of survey research, many readers will want to know who participated in the survey, how many people responded, and when the questions were asked. You could answer these questions with a note in the caption along the lines of "652 accountants, surveyed the week of January 17." Similarly, if you found a visual in a secondary source, list that source on or near the graphic to help readers assess the information. Alternatively, you can list sources in an appendix.
- **Is the visual honest?** As a final precaution, step back and verify that your visuals communicate truthful messages. Make sure they don't hide information the audience needs, imply conclusions that your information doesn't support, or play on audience emotions in manipulative or coercive ways.

For a review of the important points to remember when creating visuals, see "Checklist: Creating Effective Visuals."

VISUAL MEDIA ON MOBILE DEVICES

Whether it's a training video, an interactive big-data tool, or a GIS system used for on-site analysis, many employees need to consume visual media on smartphones and tablets. The constraints of small screens are even more acute with visuals than they are with text, so preparing visual content for mobile users takes careful planning and the use of display tools designed for mobile devices. With screen space at a premium, think carefully about audience needs, including the circumstances in which people will be using their devices so you can prioritize and sequence the delivery of information (see Figure 9.14).[14]



Hipmunk airfare-search service © Google

Figure 9.14 Visual Displays on Mobile Devices
Think through your audience's needs carefully when designing mobile visuals. As with this mobile app from the Hipmunk airfare-search service, show only the most essential information on each screen, with no extraneous information, and let users tap through for more details.

CHECKLIST Creating Effective Visuals

- Emphasize visual consistency to connect parts of a whole and minimize audience confusion.
- Avoid arbitrary changes of color, texture, typeface, position, or scale.
- Highlight contrasting points through color, position, and other design choices.
- Decide whether you want to achieve formal or informal balance.
- Emphasize dominant elements and deemphasize less important pieces in a design.
- Understand and follow (at least most of the time) the visual conventions your audience expects.
- Strive for simplicity and clarity; don't clutter your visuals with meaningless decoration.
- Follow the guidelines for avoiding ethical lapses.
- Carefully consider your message, the nature of your information, and your audience to choose which points to illustrate.
- Select the proper types of graphics for the information at hand and for the objective of the message.
- Be sure the visual contributes to an overall understanding of the subject.
- Understand how to use your software tools to maximize effectiveness and efficiency.
- Integrate visuals and text by maintaining a balance between illustrations and words, clearly referring to visuals within the text, and placing visuals carefully.
- Use titles, captions, and legends to help readers understand the meaning and importance of your visuals.
- Verify the quality of your visuals by checking for accuracy, proper documentation, and honesty.

Producing Business Videos

6 LEARNING OBJECTIVE
Identify the most important considerations in the preproduction, production, and postproduction stages of producing business videos.

The process of creating videos is divided into preproduction, production, and postproduction.

No matter what career path you pursue, chances are you'll have the need or opportunity to produce (or star in) a business video. For videos that require the highest production quality, companies usually hire specialists with the necessary skills and equipment. For most routine needs, however, any business communicator with modest equipment and a few basic skills can create effective videos.

The three-step writing process adapts easily to video; professionals refer to the three steps as *preproduction, production*, and *postproduction* (see Figure 9.15). You can refer to one of the many books available on basic video production techniques for more detail, but here are the key points to consider in all three steps. (A note on terminology: Digital videography has inherited a number of terms from film that don't make strict technical sense in a digital-only realm but are in common use anyway, including *footage* to indicate any amount of recorded video and *filming* to indicate video recording.)

STEP 1: PREPRODUCTION

When you're recording speeches, seminars, and other events, planning is crucial because you have only one opportunity to get the footage you need. And even when you have the flexibility to retake footage, thoughtful planning will save time and money and lead to better results. For any video, be sure to think through the following seven elements:

- **Purpose and scope.** With every communication effort, of course, it's essential to identify the purpose of your message and define the scope of what you will address before you start. This is doubly important with video because it is a linear medium that forces people to watch it in a predefined sequence. Most viewers won't sit through rambling or repetitive videos, so figure out what your point is and determine the briefest possible way to make it.
- **Scene composition.** Visualize what the camera is going to see. If you're demonstrating a new product, for example, do you want people to see it in a realistic setting, or would it be better to use a "clean stage" so that nothing else will compete for the viewer's attention? For "talking head" videos, in which someone talks directly into the camera at close range, an uncluttered background is preferred unless the setting is relevant. However, you don't need to resort to a bare white wall behind the subject; this can make the video feel more like an interrogation. A tastefully decorated office can look uncluttered without feeling stark or cold. Think carefully about the overall environment as well. Trying to conduct an interview outside or at a busy tradeshow, for example, can bring all kinds of noise and visual distractions into the equation.

Just as painters compose a scene, with a video camera you compose a scene by making decisions about what to show and where to place your camera.

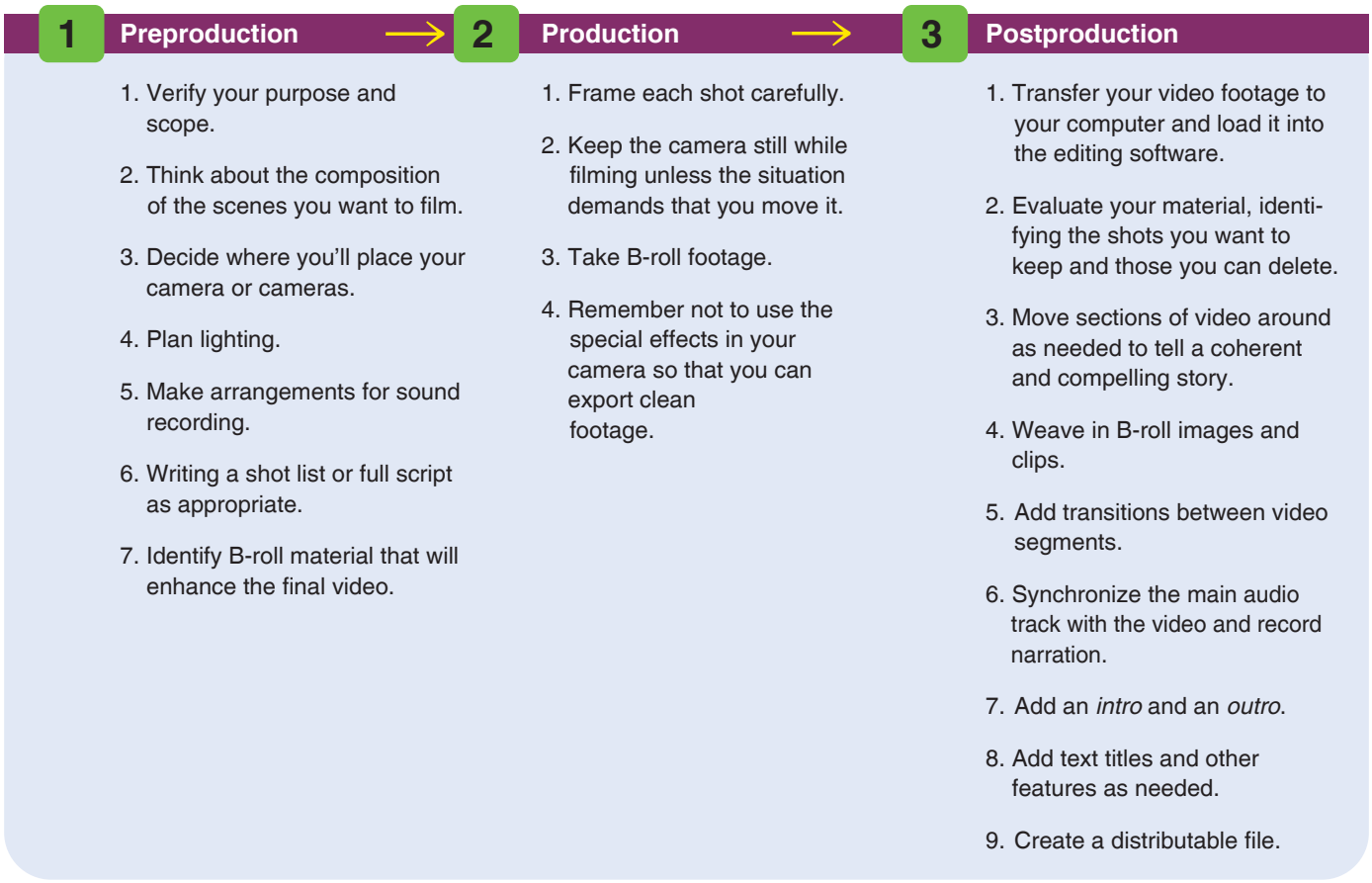


Figure 9.15 Creating Effective Business Videos
By following a methodical process in the preproduction, production, and postproduction stages, any business communicator with even basic equipment can create effective videos.

- **Camera placement.** As you visualize the scene or scenes you plan to shoot, think about where to place your camera(s). Wide, medium, and close-up positions each have their own strengths and weaknesses, depending on what you're trying to convey. For example, showing a wide shot of a crowd's reaction can emphasize the emotional impact of a speech, but a wide shot looking at the speaker from a distance will have less impact because viewers won't able to see the emotions on the speaker's face. As a technical point, position the camera as close as you can for the shot you're trying to achieve, rather than using the camera's zoom capability. Using zoom makes the recording more vulnerable to shaking and makes it more difficult for you (or the camera's autofocus function) to keep the picture in focus.[15] If you need to zoom because you can't get the camera close enough, be sure to use *optical zoom* only, not *digital zoom*, which reduces the picture quality.
- **Lighting.** Good lighting is essential for a quality production, which is why professionals sometimes spend hours lighting a single shot. Lighting can be a complicated subject, but for most business videos, the simplest solution is to get a strong but soft light directed from behind the camera toward the subject (the person, place, or thing) being filmed. This ensures that the subject is well lit and that the camera's exposure settings aren't overwhelmed by extraneous light coming from the background. Professionals use large "softboxes," reflectors, and other special equipment to direct light onto their subjects, but you can often take advantage of windows and natural daylight.[16] If you have artificial lighting that is too harsh, you can soften the light by filtering it through parchment paper.[17] When filming people, be particularly careful about strong overhead lights, which can create unflattering shadows. And when shooting outside, look for locations in full shade if possible to avoid the deep shadows created by direct sunlight.[18]

Invest the time and money to get good lighting; it is essential to quality video production.

- **Sound.** Even if your camera or smartphone has a built-in microphone, in most cases you should use an external microphone instead. The camera's microphone will pick up too much noise because it is too far away from the person or persons who are speaking, and these *omnidirectional* microphones pick up sound from every angle.[19] In most cases the best solution is to pin a small *lavaliere* microphone on each speaker's lapel. Note that you can also record one or more audio sources separately (if you have speakers in different locations, for instance) and mix them together in postproduction.

A shot list serves as your outline and checklist while you're filming.

- **Shot list.** The director and professional videographer Steve Stockman advises to always think of a video in terms of discrete shots rather than as one endless recording.[20] You can imagine shots as the equivalent of subsections or even the paragraphs in a report, each one leading smoothly to the next. Preparing a *shot list* ahead of time helps you identify all the footage you need to capture, and it serves as a checklist when you're shooting. And going beyond a shot list, whenever you're creating a video specifically (as opposed to recording a training session or some other event), consider writing a script that describes every scene and visual and contains speaking notes or even fully written dialogue. (PowerPoint and other slide programs are a great tool for planning and scripting videos.) Some people are adept at improvising, and this is often fine for informal tutorials and other purposes. However, for important videos, a script is advised. The script is also an important planning and communication tool, helping you make sure all the pieces and people are ready when it's time to shoot.[21]

B-roll is film terminology for extra scenes and images that can enhance your final production.

- **B-roll material.** The "B-roll" is another legacy term from film. It refers to a collection of secondary shots that can later be edited in to add visual interest, smooth over transitions, or otherwise improve the flow of the finished product.[22] For example, an interview with your company's CEO will look fairly static after a few minutes, but you can later cut in footage or images of your company's products, website, customers, manufacturing facilities, or other related scenes or images. The videographer Jefferson Graham makes it a point to show an image or clip of anything mentioned by a narrator or interview subject.[23] During postproduction, you can weave together your primary footage with B-roll video clips and still images, using the audio to maintain continuity from start to finish. Audiences will still get the full spoken message, only with a more interesting visual presentation.

In addition to these planning considerations, be sure to identify and prepare all the equipment the shoot will require, from cameras to lights to props. If you plan to use a smartphone as your video camera, check out some of the apps that give you more control than the phone's standard camera app provides.

STEP 2: PRODUCTION

With all your preproduction done, you're ready to shoot your video. These four tips will help you collect great footage:

- **Frame each shot carefully.** *Framing* refers to the decisions you make regarding what the camera sees and doesn't see when you aim it (see Figure 9.16). For example, if you're filming someone demonstrating a product, you'll have to decide where the camera should be aimed for each of your planned shots. If the presenter is talking at one point without using the product, you might frame the shot to emphasize the speaker's face. Then when the presenter interacts with the product, you might frame the shot to emphasize his or her hands. Just remember the obvious but sometimes overlooked point that the viewer sees everything the camera sees—but only what the camera sees. Framing decisions are particularly important if your videos will be watched on small-screen mobile devices because small screens can limit the amount of detail viewers can see clearly. The question of balance (see page 250) is important as well. Keeping a speaker's face in the center of the screen can look dull and rigid after a while, so experiment with positioning him or her just off-center to create a more dynamically balanced scene (see Figure 9.17). Also, search for interesting angles for the shots you have planned.[24] In addition to filming the subject head-on, for example, you might get some footage of him or her from the side or from high or low perspectives.

		
Wide angle	**Medium range**	**Close up**
A wide-angle shot shows the full field of view; it can be great for capturing the size and composition of a crowd, suggesting a sense of scale, and establishing a scene. One drawback is the lack of visual and emotional intimacy. In this case, the speaker appears insignificant and distant.	A medium shot may or may not be useful, depending on what you are trying to convey. For example, if someone in the crowd was arguing with the speaker, using a medium range shot to zoom in as close as possible while still getting both people in frame would help you capture the emotion of the moment.	A close-up shot conveys intimacy and emotion, and it can remove distracting elements. On the downside, you lose the crowd reactions, and staying tight on the speaker for long periods can get tedious. Mixing it up with some crowd reaction shots is a good solution.

Digital Vision/Photodisc/Getty Images

Figure 9.16 Shaping Your Message by Framing Your Shots
Decisions about how you frame your shots can have a dramatic effect on information delivery and emotional impact. Compare the effect of these long, medium, and close shots, for example. Remember that your viewers can see everything the camera sees, but only what the camera sees.



Indiapicture /Alamy Stock Photo

Figure 9.17 Framing Your Shots: Finding the Right Balance
Visual balance is another key decision when framing your shots. For a close-up of a person speaking directly to a camera, for example, positioning the subject slightly off center makes the scene feel more dynamic. This also gives you room to display text on screen, if desired.

- **Keep the camera still.** If the camera moves around—intentionally or unintentionally—during a shot, the resulting footage puts a greater demand on your viewers. Shaky video from a handheld camera is uncomfortable to watch, so whenever possible, use a tripod or other stabilizing arrangement. And intentionally moving the camera forces viewers to process additional visual information that may or may not be relevant.[25] Moving during a shot also changes the background and lighting because the camera is looking at the scene differently. Sometimes you don't have a choice and must follow a moving subject, but don't move the camera while filming unless you really need to.

Resist the temptation to move around with your camera while filming unless it is absolutely necessary.

- **Take B-roll footage.** In addition to the B-roll shots you planned in preproduction, keep an eye out for other interesting scenes and images that might enhance the finished video. It's better to shoot lots of footage you don't use than to regret not capturing something when you had the chance.

- **Don't use the special effects in your camera.** Many cameras and camera apps can add special effects such as pixilation or "old-timey" sepia tones, but using these features in the camera usually permanently alters the video. Instead, export "clean" footage to your editing software and add any effects in postproduction, where you can easily undo anything you try.[26]

STEP 3: POSTPRODUCTION

Postproduction involves the use of video editing software to place all your video and audio elements in the desired sequence.

Postproduction (often referred to simply as "post") is where interesting, high-quality videos come to life, as you use editing software to weave your main footage and B-roll footage into a seamless show and enhance it with music, titles, and other elements. Postproduction also lets you cut out clumsy bits of footage, record narration, potentially replace sections of dialogue, and make other fixes. With even low-cost video editing software, you can produce surprisingly sophisticated videos.

Here is a general overview of the postproduction process:[27]

1. Transfer your video footage to your computer and load it into the editing software.
2. Evaluate your material, identifying the shots you want to keep and those you can delete.
3. Use cut and paste to move sections of video around as needed to put the story in the desired order.
4. Weave in B-roll images and clips. Your company might have a standard library of media elements to use in videos, including logos or introductory sequences. You can also license *stock footage* to include with your own footage.
5. Add transitions (such as a blend or a quick fade to black) between video segments, if desired.
6. Synchronize the main audio track with the video and record narration as needed.
7. Add an *intro* (a brief sequence at the beginning) and an *outro* (a brief sequence at the end). Business videos often include company logos, website URLs, and other branding elements in intros and outros. Intros and outros often contain brief musical segments as a way to transition into and out of the spoken portion of the video.
8. Add text titles and other features as needed.
9. Create a distributable file. Video editors give you a variety of output options at different file sizes and screen resolutions, and some let you upload directly to YouTube.

MOBILE APP

Videoshop offers a variety of postproduction tools for enhancing mobile videos right on your phone.

As more companies rely on video for internal and external communication, learning some basic video skills will make you a more effective and more valuable communicator

COMMUNICATION CHALLENGES AT Tableau Software

You've joined Tableau as its director of internal communications with responsibility for all aspects of communicating with current and potential employees. Apply what you've learned in this chapter to the following challenges.

INDIVIDUAL CHALLENGE: Read about Tableau's core values (check the careers section of the company's website). Imagine that you want to add a list called Principles of Ethical Visual Communication to these values. Using what you learned in this chapter and your own understanding of ethical communication, draft a list of six specific principles that Tableau employees should adhere to in their own visual communication efforts (of any kind, not just data visualization).

TEAM CHALLENGE: With a team assigned by your instructor, your task is to plan a two- to three-minute video designed to encourage college students to consider working at Tableau. Review the preproduction tips on pages 268–270 and then brainstorm the scope of your video and identify the various scenes you would like to include. For example, you might have one scene that shows customers using the company's software, another that shows employees interacting, and another that shows the neighborhood around Tableau's headquarters in Seattle. With your scenes in mind, develop a shot list that identifies the specific pieces of footage you would want to capture for each scene. (Use your imaginations as needed, and be sure to explore the Tableau website for ideas—including the Life at Tableau photo section.) Lastly, write a narration script that you could record to accompany the video footage.

Key Terms

bar chart Chart that portrays quantities by the height or length of its rectangular bars

bubble diagram Chart that expands the scatter diagram idea to three variables, with the size of the bubble representing the third variable

caption Brief commentary or explanation that accompanies a visual

data visualization A diverse class of displays that can show enormous sets of data in a single visual or show text and other complex information visually

flowchart Process diagram that illustrates a sequence of events from start to finish

Gantt chart The best-known type of time line chart

infographics Diagrams that contain enough visual and textual information to function as independent, standalone documents

legend A "key" that helps readers decode a visual by explaining what various colors, symbols, or other design choices mean

line chart Chart that illustrates trends over time or plots the relationship of two or more variables

organization chart Diagram that illustrates the positions, units, or functions of an organization and their relationships

pie chart Circular chart that shows how the parts of a whole are distributed

radar diagram A circular diagram that maps the characteristics of multiple entities or choices according to several variables

scatter diagram Chart that plots discrete data points, with one variable along the *x* (horizontal) axis and another along the *y* (vertical) axis

surface chart Form of line chart with a cumulative effect; all the lines add up to the top line, which represents the total

title Text that identifies the content and purpose of a visual

visual literacy The ability to create effective images and to correctly interpret such images

visual symbolism The connotative (as opposed to the denotative, or literal) meaning of visuals

Summary of Learning Objectives

1 Explain the power of business images, discuss six principles of graphic design that help ensure effective visuals, and explain how to avoid ethical lapses when using visuals. Well-designed visual elements can enhance the communication power of textual messages and, in some instances, even replace textual messages. Visuals can often convey some message points (such as spatial relationships, correlations, procedures, and emotions) more effectively and more efficiently than words. In the numbers-oriented world of work, readers rely heavily on trend lines, distribution curves, and other visual presentations of numeric quantities. Visuals attract and hold people's attention, helping your audience understand and remember your message. Visuals are also an effective way to communicate with diverse audiences. When preparing visuals, (1) use elements of design consistently so you don't confuse your audience; (2) use color and other elements to show contrast effectively; (3) strive for a visual balance, either formal or informal, that creates a feel that is appropriate for your overall message; (4) use design choices to draw attention to key elements and to visually downplay less important items; (5) understand and follow design conventions that your audience expects (even if the expectation is subconscious), although you can consider unconventional design choices if they promise to convey your message more effectively; and (6) strive for simplicity in all your visuals, making design decisions that enhance the reception and understanding of information rather than obscure or confuse it.

Communicators are responsible for avoiding both intentional and unintentional ethical lapses when using visual elements. They can work to avoid these lapses by (1) considering all possible interpretations—and misinterpretations—of their messages and avoiding design choices that could lead to unwanted interpretations; (2) providing sufficient context, whether visual or verbal, for audiences to understand the meaning and significance of visuals; (3) not hiding or minimizing negative information that runs counter to their arguments; (4) not exaggerating information that supports their arguments; (5) not oversimplifying complex situations by hiding complications that are relevant to the audience's understanding; (6) not implying cause-and-effect relationships without providing proof that they exist; (7) avoiding emotional manipulation or other forms of coercion; and (8) being careful with the way they aggregate data.

2 Explain how to choose which points in your message to illustrate. To decide which points to illustrate, first step back and consider the overall flow of your message from the audience's point of view. Identify elements of the message that might be complex, vulnerable to misinterpretation, or even dull. Look for connections between ideas that should be highlighted or extensive collections of data and other discrete factual content that might be difficult to read in textual format.

3 Describe the most common options for presenting data in a visual format. The visuals most commonly used to present data include tables, line and surface charts, bar charts, pictograms, Gantt charts, scatter and bubble diagrams, radar diagrams, and pie charts. You will probably use line, bar, and pie charts most often in your business communication efforts. Moving beyond basic display formats, data visualization tools help communicators work with large data sets.

4 Describe the most common options for presenting information, concepts, and ideas. Among the most commonly used visual formats in business communication are flowcharts (which depict a sequence of events in a process), organization charts (which show the relationships among people or elements in an organization), various types of maps (including data-driven map displays made possible by geographic information systems), illustrations (which are often used instead of photographs because they can focus attention on specific parts of an object), diagrams (used to convey designs, interrelated ideas, and other complex entities), photographs (used when realism or emotional impact is important), and infographics (hybrid elements that contain enough textual and visual information to function as standalone documents).

5 Explain how to integrate visuals with text, and list three criteria to review in order to verify the quality of your visuals. To integrate visuals with text, strive for a balance between text and visuals; refer to visuals clearly; place visuals to maximize the smooth flow of reading; and write helpful titles, captions, and

legends. To verify the quality of your visuals, make sure every visual is accurate (there are no mistakes or missing information), properly documented (the creator of any underlying data used in the visual has been given complete credit), and honest (the visual honestly reveals the real meaning of the underlying data or information).

6 Identify the most important considerations in the preproduction, production, and postproduction stages of producing business videos. The key tasks in the preproduction stage are verifying your purpose and scope, thinking about the composition of the scenes you want to film, deciding where you'll place your camera(s), planning lighting, making arrangements for sound recording, writing a shot list or full script as appropriate, and identifying B-roll material that will enhance the final video. During the production stage, be sure to frame each shot carefully, keep the camera still while filming unless the situation demands that you move it, take B-roll footage, and remember not to use the special effects in your camera so that you can export clean footage.

The postproduction stage generally consists of nine steps: (1) transfer your video footage to your computer and load it into the editing software; (2) evaluate your material, identifying the shots you want to keep and those you can delete; (3) move sections of video around as needed; (4) weave in B-roll images and clips; (5) add transitions between video segments, if desired; (6) synchronize the main audio track with the video and record narration as needed; (7) add an *intro* and an *outro*; (8) add text titles and other features as needed; and (9) create a distributable file.

Test Your Knowledge

To review chapter content related to each question, refer to the indicated Learning Objective.

9-1. Why is simplicity important in business visuals? [LO-1]

9-2. What are the "five Cs" to consider when deciding which points to illustrate? [LO-2]

9-3. What type of data visual would you use to illustrate trends over time? [LO-3]

9-4. When would you use a bubble diagram instead of a scatter diagram? [LO-3]

9-5. For what purposes are Gantt charts used? [LO-3]

9-6. Why might you use a simplified line illustration instead of a full-color digital photograph in a particular application? [LO-4]

9-7. What is the purpose of adding titles, captions, and legends to visuals in reports? [LO-5]

9-8. How do you check a visual for quality? [LO-5]

9-9. Why do experts recommend against using the built-in microphones in video cameras? [LO-6]

9-10. How does B-roll footage help enhance the appeal of business videos? [LO-6]

Apply Your Knowledge

To review chapter content related to each question, refer to the indicated Learning Objective.

9-11. What similarities do you see between visuals and nonverbal communication? Explain your answer. [LO-1]

9-12. After studying the designs of corporate websites, Penn State University professor S. Shyam Sundar discovered quite an interesting phenomenon: The more interactive and engaging a website is, the more likely visitors are to "buy into whatever is being advocated" on the site. In other words, if two websites have identical content, the site with greater interactivity and more "bells and whistles" would be more persuasive.[28] Is it ethical to increase the persuasive power of a website simply by making it more interactive? Why or why not? [LO-1]

9-13. You're writing a report for the director of human resources on implementing team-based management throughout your company. You want to emphasize that since the new approaches were implemented six months ago, absenteeism and turnover have been sharply reduced in all but two departments. How do you visually present your data in the most favorable light while maintaining honest communication? Explain. [LO-1]

9-14. In addition to telling readers why an illustration is important, why else should you refer to it in the text of your document? [LO-5]

9-15. You've been assigned the project of videotaping a new-employee welcome message by your company's vice president of human resources. You have top-notch equipment, attractive locations, and a solid script. There's just one problem: This executive is uncomfortable speaking on camera, and your first few shots are full of awkward gestures and nervous vocal tics. Assuming there isn't time for the executive to see a public speaking coach, how might you rethink your approach to the project in order to produce the most compelling video? [LO-6]

9-16. Imagine that you are going to film your instructor's next lecture and you have the luxury of using three cameras. Where would you position them, and why? (If you are taking an online course with no classroom, describe a generic classroom setting.) [LO-6]

Practice Your Skills

Messages for Analysis

9-17. Presenting Data (Bar Charts) [LO-1], [LO-3] Examine the bar chart in Figure 9.18 and point out any problems or errors you notice.

9-18. Presenting Data (Line Charts) [LO-1], [LO-3] Examine the line chart in Figure 9.19 and point out any problems or errors you notice.

Exercises

Each activity is labeled according to the primary skill or skills you will need to use. To review relevant chapter content, you can refer to the indicated Learning Objective.

9-19. Applying Visual Design Principles [LO-1] Find three visual presentations of data, information, or concepts on any business subject. Which of the three most clearly

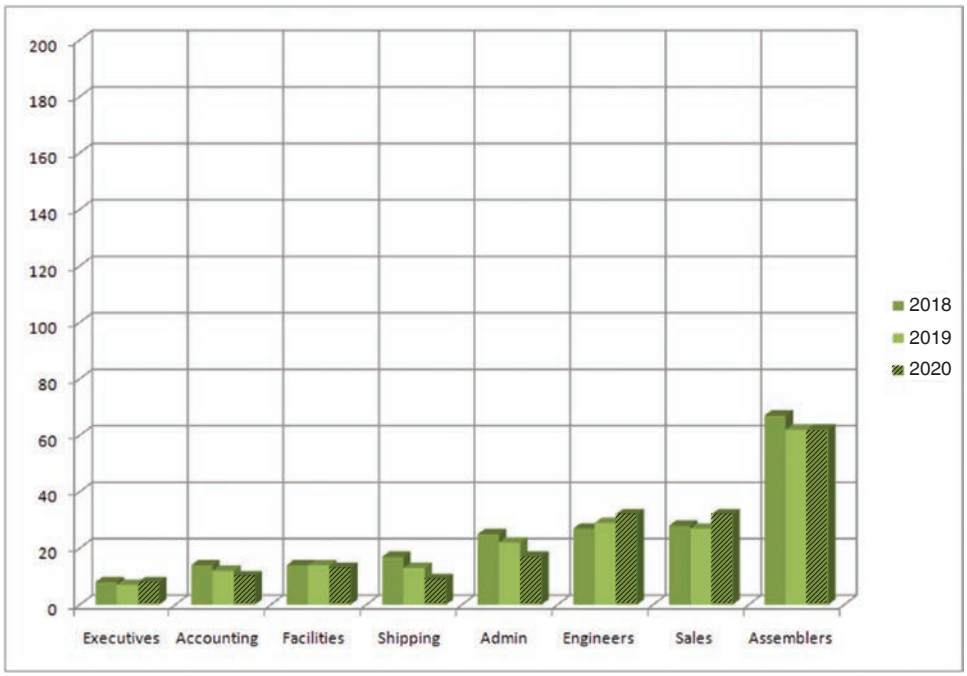


Figure 9.18 Bar Chart for Analysis

presents its data or information? What design choices promote this level of clarity? What improvements would you make to the other visuals to make them clearer?

9-20. **Communication Ethics** [LO-1] Using a spreadsheet, create a bar chart or line chart from data you find online or in a business publication. Alter the horizontal and vertical scales in several ways to produce different displays of the original data. How do the alterations distort the information? How might a reader detect whether a chart's scale has been altered?

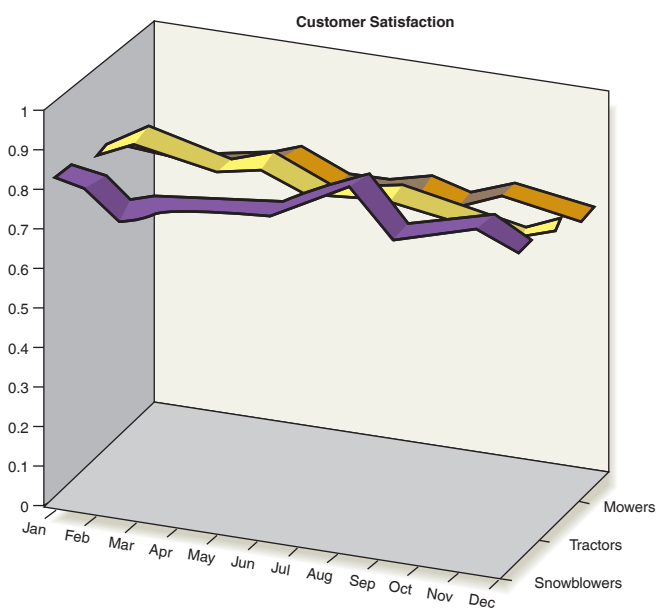


Figure 9.19 Line Chart for Analysis

9-21. **Presenting Data (Bar and Pie Charts)** [LO-3] As a market researcher for a statewide chain of car dealerships, you're examining car and truck ownership and lease patterns among single drivers in various age groups. By discovering which age groups have the highest percentages of owners, you will be better able to target advertising that promotes the leasing option. Using the information that follows, prepare a bar chart comparing the number of owners with the number of people who lease in each age category. Be sure to label your chart and include combined totals for owners and lessees ("total drivers"). Then prepare a pie chart showing the proportion of owners and lessees in the one age group you think holds the most promise for leasing a new vehicle. Write a sentence that prepares your company's management for the information shown in the pie chart.

Age Group	Number of Owners (in Thousands)	Number of Lessees (in Thousands)
18–24	1,830	795
25–29	1,812	1,483
30–34	1,683	1,413
35–44	1,303	1,932
45–54	1,211	1,894
55–64	1,784	1,435
65–74	3,200	1,142
75+	3,431	854

9-22. **Presenting Data (Bar Charts)** [LO-3] Team up with a classmate to design charts based on a comparison of the total tax burden of the U.S. taxpayer with that of people in other nations (see the data following this paragraph). One teammate should sketch a horizontal or vertical bar chart, and the other should sketch a pictogram from the estimates that follow. Then exchange charts and analyze how well each conveys the situation of the U.S. taxpayer. Would the bar chart look best with vertical or horizontal bars? Why? What scale is best? How does the symbol used in the pictogram enhance or obscure the meaning or impact of the data? What suggestions can each student make for improving the other's visual aid?

Estimates show that French taxpayers spend 48 percent of their incomes on taxes, Swedish taxpayers spend 43 percent, Japanese taxpayers spend 33 percent, U.S. taxpayers spend 32 percent, and British taxpayers spend 31 percent.

9-23. Presenting Data (Line Charts) [LO-3] Here are last year's sales figures for the appliance and electronics megastore where you work. Construct a line chart that will help you explain to the store's general manager seasonal variations in each department.

STORE SALES (IN $ THOUSANDS)

Month	Home Electronics	Computers	Appliances
January	68	39	36
February	72	34	34
March	75	41	30
April	54	41	28
May	56	42	44
June	49	33	48
July	54	31	43
August	66	58	39
September	62	58	36
October	66	44	33
November	83	48	29
December	91	62	24

9-24. Presenting Data (Line Charts) [LO-3] Using rough approximations of the data, re-create the line chart in Figure 9.4 on page 256 as a bar chart (estimate the numerical values). Which of these two formats does the better job of conveying the information?

9-25. Presenting Data (Data Visualization) [LO-3] Search online for data visualization tools that are appropriate for business use. Choose one that has the potential to help business managers make decisions. Write a post for your class blog explaining how this tool could assist with decision making. Be sure to include a link to the site where you found it.

9-26. Presenting Information, Concepts, and Ideas (Photographs) [LO-4] With a team assigned by your instructor, find a busy location on campus or in the surrounding neighborhood, someplace with lots of signs, storefronts, pedestrians, and traffic. Scout out two different photo opportunities: one that maximizes the visual impression of crowding and clutter, and one that minimizes this impression. For the first, assume that you are someone who advocates reducing the crowding and clutter, so you want to show how bad it is. For the second, assume you are a real estate agent or someone else who is motivated to show people that even though the location offers lots of shopping, entertainment, and other attractions, it's actually a rather calm and quiet neighborhood. Insert the two images in a document or blog post and write a caption for each that emphasizes the two opposite messages just described. Finally, write a brief paragraph discussing the ethical implications of what you've just done. Have you distorted reality or just presented it in ways that work to your advantage? Have you prevented audiences from gaining the information they would need to make informed decisions?

9-27. Presenting Information, Concepts, and Ideas (Maps) [LO-4] You work for C & S Holdings, a company that operates coin-activated, self-service car washes. Research shows that the farther customers live from a car wash, the less likely they are to visit. You know that 50 percent of customers at each of your car washes live within a 4-mile radius of the location, 65 percent live within 6 miles, 80 percent live within 8 miles, and 90 percent live within 10 miles. C & S's owner wants to open two new car washes in your city and has asked you to prepare a report recommending locations. Using a map of your city, choose two possible locations for car washes and create a visual depicting the customer base surrounding each location.

9-28. Presenting Information, Concepts, and Ideas (Organization Charts) [LO-4] Create an organization chart for your college or university. Start with the school's website to learn the various offices and departments.

9-29. Selecting the Right Type of Visual [LO-3], [LO-4] With a team of two or three other students, brainstorm and then sketch at least three types of charts you can use to compare the populations of all 50 states in the United States. You can use any of the graphic ideas presented in this chapter as well as any ideas or examples you find from other sources.

9-30. Planning Business Videos; Mobile Skills [LO-6] Assume you are producing a video interview of your college or university's president. The purpose of the video is to encourage high school students to consider applying to your school. The interview will take place in the president's office, but you want to add some B-roll footage to make the video more visually appealing. Identify six scenes around campus that you could film for this purpose. Next, using a digital camera or the video capability in a phone, film these six scenes and share the B-roll footage with your class. Be sure to frame them in a way that they will be adequately viewable on mobile screens. As an option, add voiceover narration, titles, and other enhancements.

Expand Your Skills

Critique the Professionals

Find a business video on YouTube or another online source. This can be a product demonstration, a tutorial, a company profile, or most any other type of video other than an overt promotional video such as a TV commercial. Analyze its effectiveness in terms of lighting, sound, narration, camera placement, and the use of B-roll elements. How would you assess its overall effectiveness as a business message? Summarize your conclusions in a post on your class blog or an email message to your instructor. Be sure to include a link to the video.

Sharpening Your Career Skills Online

Find a website, video, article, podcast, or presentation that offers advice on creating effective visuals for documents and presentations. Write a brief email message to your instructor, describing the item that you found and summarizing the career skills information you learned from it.

Build Your Career

In Chapter 8's Build Your Career activity, you researched companies that you might be interested in working for after graduation. Now it's time to research specific career paths and professions. Even if you have already chosen a professional specialty, some research will help you understand the profession better, including employer expectations, current salary ranges, employment outlooks, hot topics, controversies, jargon, and other helpful insights.

A good place to start is the Occupational Outlook Handbook published by the U.S. Department of Labor's Bureau of Labor Statistics (**www.bls.gov/ooh**). This comprehensive guide offers employment projections, median salaries, education requirements, and other key factors for a wide variety of professions in business and other fields. CareerOneStop (**www.careeronestop.org**), another site maintained by the Department of Labor, also offers information for exploring careers.

Organizations focused on specific professions can be great resources for learning more about jobs and career paths. The American Institute of CPAs (**www.aicpa.org**) and the American Marketing Association (**www.ama.org**), for example, have information on accounting and marketing careers, respectively.

Once you have an idea of specific job titles, plug these into various job posting websites (see Table 18.2 on page 521). Study the listings you find to get more details on expectations and responsibilities. Many job listings also give clues about what life on the job would be like, including how much travel is expected and whether you can work from home.

Finally, find and follow industry insiders on social media to get current insights into what goes on in various professions. The more information you have when it comes time to interview, the more successful you will be in finding the best job for your interests.

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PART 4

Brief Messages

CHAPTER 10 Writing Routine and Positive Messages

CHAPTER 11 Writing Negative Messages

CHAPTER 12 Writing Persuasive Messages

Most of your communication on the job will be through brief messages, from Twitter updates and blog posts to formal letters that might run to several pages. Learning how to write these messages quickly and effectively is key to maintaining productive working relationships with colleagues and customers. In these chapters you'll find specific techniques for crafting routine, positive, negative, and persuasive messages—techniques that will help you in everything from getting a raise to calming an angry customer to promoting your next great idea.



Hero Images/Getty Images

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10 Writing Routine and Positive Messages

LEARNING OBJECTIVES

After studying this chapter, you will be able to

1. Outline an effective strategy for writing routine business requests.
2. Describe three common types of routine requests.
3. Outline an effective strategy for writing routine replies, routine messages, and positive messages.
4. Describe seven common types of routine replies and positive messages.



Image Courtesy of Jill Duffy

Jill Duffy offers research-based advice on handling the barrage of routine messages that most business communicators deal with on the job.

COMMUNICATION CLOSE-UP AT

Productivity Report

productivityreport.org

Every so often, you'll get the chance to craft a message or document that has the potential to reshape your career or your company, such as a major project proposal or a business plan. However, much of your business communication will take place through routine, everyday messages—asking someone for help or information, responding to such requests from others, sharing information with colleagues or customers, and congratulating or consoling other people.

Just because these messages are routine, though, doesn't make them unimportant. In fact, the cumulative effect of all these brief messages could be more influential on your career than the occasional major report or proposal. The way you handle communication, day in and day out, is a key factor in establishing your credibility as a professional.

Developing your skills at handling routine messages is only part of the challenge. Depending on your field and your position, you're likely to be inundated with routine messages. It's not uncommon for professionals to receive a hundred or more messages a day—and be expected to respond to many of them while generating many more messages themselves. So not only do you need to be skilled at handling routine communication, you also must be hyper-efficient at it, or else you'll get hopelessly swamped.

Fortunately, you have a wise ally in Jill Duffy. Her career as a writer spans multiple industries, from academic journals to major newspapers to the trade journals *Game Developer* and *PC*. One of her areas of expertise is personal and organizational productivity, and she shares her ideas in the weekly Get Organized column for *PC*, in her book *Get Organized: How to Clean Up Your Messy Digital Life*, and via her newest venture, the website *Productivity Report*, which blends advice from research studies and personal experience. Her deep and diverse experience has given her useful insights into the challenges of digital productivity, and much of that involves how to handle a high volume of routine messages without losing focus on the audience or on top work priorities.

For email, for instance, she advises compartmentalizing message flows so that high-priority messages never get lost in the deluge of low-priority messages. Most email programs and apps offer the ability to filter messages based on sender, subject line, and other factors so you can make sure important messages are

always visible. Then develop a comprehensive system of software capabilities and daily habits to keep email in check. For example, if one of your goals is to respond to your boss's emails before you go home every day, set up an email filter to send those messages to a special folder and set an alarm to deal with them at 4:00 every day. Another skill Duffy promotes is acting quickly and decisively on incoming email, whether that is deleting a message, filing it, responding immediately (for simple or urgent messages), or scheduling time to respond. The key is to avoid looking at a message multiple times before deciding what to do with it.

Duffy doesn't subscribe to the approach taken by email users who never bother filtering and filing messages but who instead let them pile up in their inbox and use search functions to find specific messages whenever they need them. She points out several problems with this approach. First, if you can't remember who sent a message or the exact keywords that are in it, you'll never find it with search methods alone. Second, folders organized by subject serve as a "second memory" that she can browse whenever she wants. Third, that giant, unsorted pile of messages in your inbox will be a constant source of anxiety and distraction, as you repeatedly scan though it trying to find a specific item or to make sure you haven't missed anything important.

Whether it's email, workgroup messaging, or any other communication platform, setting up and fine-tuning a system and set of habits that work best for you does take some time and effort. However, it will be time well spent because you'll be more efficient every day and you'll be able to focus your attention and energy on the messages that matter the most.[1]



Strategy for Routine Requests

1 LEARNING OBJECTIVE
Outline an effective strategy for writing routine business requests.

Jill Duffy (profiled in the chapter-opening Communication Close-Up) helps business professionals deal with a vital aspect of communication in today's digital workplace: how to productively handle the many routine messages that need to be sent or answered day in and day out. Routine messages fall into two groups: routine requests, in which you ask for information or action from another party, and a variety of routine and positive messages.

The direct approach is fine for most routine requests, routine messages, and positive messages.

With most routine requests, your audience will be inclined to respond as you ask, so the direct approach is fine. For unusual, unexpected, or unwelcome requests, the indirect approach with a strong element of persuasion is a better choice (see Chapter 11).

Like all other business messages, a routine request has three parts: an opening, a body, and a close. Using the direct approach, open with your main idea, which is a clear statement of your request. Use the body to give details and justify your request. Finally, close by requesting specific action.

OPEN WITH YOUR REQUEST

Take care that the direct approach doesn't come across as abrupt or unfriendly.

With routine requests, you can make your request at the beginning of the message. Of course, getting right to the point should not be interpreted as license to be abrupt or tactless:

- **Pay attention to tone.** Instead of demanding action ("Send me the latest version of the budget spreadsheet"), show respect by using words such as *please* and *I would appreciate*.
- **If appropriate, acknowledge that you are asking for someone's time and effort.** Even if responding to your request is part of someone's job responsibilities, a few words of acknowledgment help maintain a positive relationship: "I know you're swamped this week, but when you have a second, could you send me . . ."
- **Be specific.** Don't expect the reader to figure out what you need. For example, if you request the latest market data from your research department, be sure to say whether you want a one-page summary or 100 pages of raw data.

EXPLAIN AND JUSTIFY YOUR REQUEST

If you have an unusual or complex request, break it down into specific, individual questions that are easier to process.

Use the body of your message to explain or justify your request, as needed. Make the explanation a smooth and logical outgrowth of your opening remarks. If complying with the request could benefit the reader, be sure to mention that. If you have an unusual or complex request, break it down into specific, individual questions so that the reader

can address each one separately. This consideration shows respect for your audience's time and will help them respond more accurately to your request.

REQUEST SPECIFIC ACTION IN A COURTEOUS CLOSE

Close request messages with
- A request for some specific action
- Information about how you can be reached
- An expression of appreciation

Close your message with three important elements: (1) deadlines and other important information that will help the reader respond, (2) information about how you can be reached (if it isn't obvious), and (3) an expression of appreciation or goodwill. When you ask readers to perform a specific action, ask for a response by a specific date or time, if appropriate (for example, "Please send the figures by May 5 so that I can return first-quarter results to you before the May 20 conference").

Conclude your message with a sincere expression of gratitude, but avoid saying "thank you in advance," which can come across as presumptuous. Good alternatives include "I appreciate your help" or a simple "Thank you."[2] To review, see "Checklist: Writing Routine Requests."

Common Examples of Routine Requests

2 LEARNING OBJECTIVE
Describe three common types of routine requests.

The most common types of routine messages are asking for information or action, asking for recommendations, and making claims and requesting adjustments.

ASKING FOR INFORMATION OR ACTION

As you plan a request, think about what you can do to make it as easy as possible for your recipients to respond.

Most of your routine requests will involve asking someone to provide information or take some specific action. As you plan your message, think about what you can do to make responding to the request as easy as possible. If it's relevant, point out any benefits of complying with your request, whether a personal benefit to those involved or something that will benefit your organization as a whole. Naturally, be sure to adapt your request to your audience and the situation (see Figure 10.1 on the next page).

ASKING FOR RECOMMENDATIONS

For a variety of reasons, you may need to ask people who know you in a professional or personal capacity to provide you with a recommendation or serve as a reference.

At various stages of your career, you may need to ask people who know you in a professional or personal capacity to provide you with a recommendation or serve as a reference. A recommendation usually takes the form of a brief letter or email message that expresses someone's confidence in your ability to perform a job, fulfill the terms of a contract, or do whatever the situation entails (see page 291). Serving as a reference often means agreeing to have a phone conversation or email exchange with a representative from the hiring company or other organization involved, during which the person will answer questions and provide background information about you. (Before you volunteer anyone's name as a reference, you must ask permission to do so.)

CHECKLIST ✓ Writing Routine Requests

A. State your request up front.
- Write in a polite, undemanding, personal tone.
- Use the direct approach because your audience will probably respond favorably to your request.
- Be specific and precise in your request.

B. Explain and justify your request.
- Justify the request or explain its importance.
- Explain any potential benefits of responding.
- Ask the most important questions first.
- Break complex requests into individual questions that are limited to only one topic each.

C. Request specific action in a courteous close.
- Make it easy to comply by including appropriate contact information.
- Express your gratitude.
- Clearly state any important deadlines for the request.

1 Plan → 2 Write → 3 Complete

Analyze the Situation
Verify that the purpose is to request information from company managers.

Gather Information
Gather accurate, complete information about local competitive threats.

Choose Medium and Channel
Email is effective for this internal message, and it allows the attachment of a Word document to collect the information.

Organize the Information
Clarify that the main idea is collecting information that will lead to a better competitive strategy, which will in turn help the various district managers.

Adapt to Your Audience
Show sensitivity to audience needs with a "you" attitude, politeness, positive emphasis, and bias-free language. The writer already has credibility as manager of the department.

Compose the Message
Maintain a style that is conversational but still businesslike, using plain English and appropriate voice.

Revise the Message
Evaluate content and review readability; avoid unnecessary details.

Produce the Message
Simple email format is all the design this message needs.

Proofread the Message
Review for errors in layout, spelling, and mechanics.

Distribute the Message
Deliver the message via the company's email system.

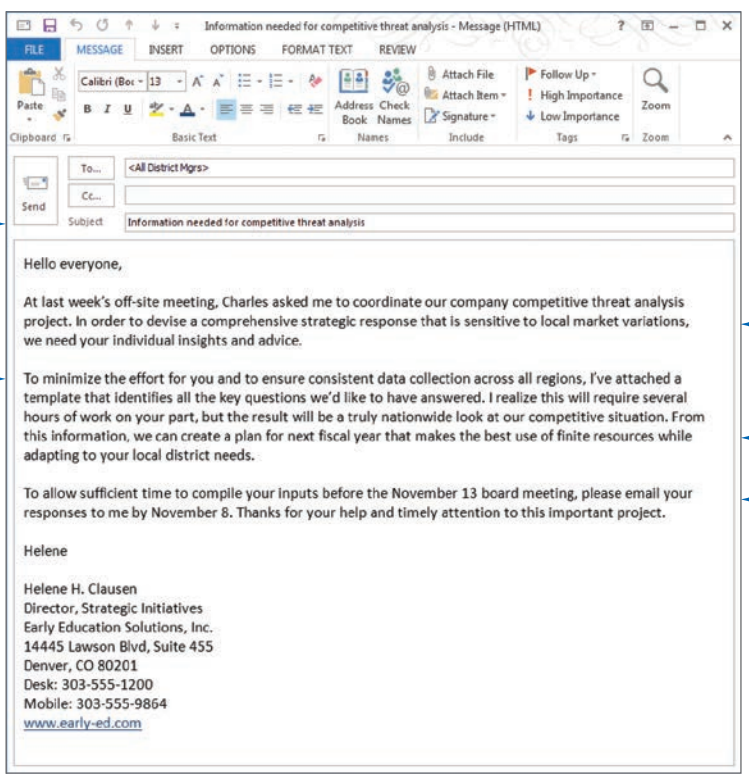


Figure 10.1 Routine Message Requesting Action
In this email request to district managers across the country, the writer asks them to fill out an attached information collection form. Although the request is not unusual and responding to it is part of the managers' responsibility, she asks for their help in a courteous manner and points out the benefits of responding.

These requests are usually routine, so the direct approach is fine. However, you shouldn't always assume a positive response, and a negative response may not be related to your qualifications. You are asking busy people to devote time and energy on your behalf, and you're asking them to put their own reputations on the line. In some cases, the person may not know you well enough or may not believe that the opportunity you are pursuing is a good fit for you. In addition, when it comes to job references, some organizations don't allow their staff to provide anything beyond confirmation of employment.

When requesting recommendations, remember you are asking people to put their own reputations on the line.

Open your message by clearly stating why the recommendation is required (if it's not for a job, be sure to explain its purpose) and what you would like your reader to do on your behalf. If you haven't had contact with the person for some time, use the opening to trigger memories of the relationship you had, including dates and any special events or accomplishments that might bring a clear and favorable picture of you to mind.

Use the body to provide information that will make it easy for the recipient to comply with your request:

- The nature of the opportunity you are pursuing
- The action you are asking for (such as writing a message or agreeing to answer questions)
- Information that you would like the recommendation to convey, such as your work experience, skills, training, character, and fitness for the opportunity
- Full contact information if you are asking the person to send a letter or email message
- The application deadline or other date by which you need the recommendation

If it will give the recipient a helpful overview of your career since your last contact, consider including an up-to-date résumé.

Close your message with a sincere thank you. If you are requesting a printed letter, always be sure to enclose a stamped, preaddressed envelope as a convenience to the other party. Figure 10.2 on the next page provides an example of a request that follows these guidelines.

MAKING CLAIMS AND REQUESTING ADJUSTMENTS

If you're dissatisfied with a company's product or service, you can opt to make a **claim** (a formal complaint) or request an **adjustment** (a settlement of a claim). Open with a clear and calm statement of the problem along with your request. In the body, give a complete, specific explanation of the details. Provide any information the recipient needs to verify your complaint. In your close, politely request specific action or convey a sincere desire to find a solution. And, if appropriate, suggest that the business relationship will continue if the problem is solved satisfactorily. Be prepared to back up your claim with invoices, sales receipts, payment evidence, dated correspondence, and any other relevant documents.

A *claim* is a formal complaint; an *adjustment* is a remedy you ask for to settle a claim.

When writing a claim or requesting an adjustment
- Explain the problem and give details
- Provide backup information
- Request specific action

If the remedy is obvious, explain what you would like to be done. If you're not sure how the situation should be resolved, you can ask the company to assess the situation and propose a solution.

Compare the ineffective and effective versions in Figure 10.3 on page 287 for an example of making a claim. To review the tasks involved in making claims and requesting adjustments, see "Checklist: Making Claims and Requesting Adjustments."

CHECKLIST ✓ Making Claims and Requesting Adjustments

- Maintain a professional tone, even if you're extremely frustrated.
- Open with a straightforward statement of the problem.
- Provide specific details in the body.
- Present facts honestly and clearly.
- Politely summarize the desired action in the closing.
- Clearly state what you expect as a fair settlement or ask the reader to propose a fair adjustment.
- Explain the benefits of complying with the request, such as your continued patronage.

1 Plan → **2 Write** → **3 Complete**

Analyze the Situation
Verify that the purpose is to request a recommendation letter from a college professor.

Gather Information
Gather information on classes and dates to help the reader recall you and to clarify the position you seek.

Choose Medium and Channel
The letter format gives this message an appropriate level of formality, although many professors prefer to be contacted by email.

Organize the Information
Messages like this are common and expected, so a direct approach is fine.

Adapt to Your Audience
Show sensitivity to audience needs with a "you" attitude, politeness, positive emphasis, and bias-free language.

Compose the Message
Style is respectful and businesslike, while still using plain English and appropriate voice.

Revise the Message
Evaluate content and review readability; avoid unnecessary details.

Produce the Message
Simple letter format is all the design this message needs.

Proofread the Message
Review for errors in layout, spelling, and mechanics.

Distribute the Message
Deliver the message via postal mail or email if you have the professor's email address.

1181 Ashport Drive
Tate Springs, TN 38101
March 14, 2021

Professor Lyndon Kenton
School of Business
University of Tennessee, Knoxville
Knoxville, TN 37916

Dear Professor Kenton:

I recently interviewed with Strategic Investments and have been called for a second interview for their Analyst Training Program (ATP). They have requested at least one recommendation from a professor, and I immediately thought of you. May I have a letter of recommendation from you?

As you may recall, I took FINC 425, Investment and Portfolio Management, from you during the Fall 2020 semester. I was fascinated by the methods of risk and return analysis you presented, and the class confirmed my decision to pursue a career in investment management.

My enclosed résumé includes all my relevant work experience and volunteer activities. I would also like to add that I've handled the financial planning for our family since my father passed away several years ago, and I have increasingly applied my business training in deciding what stocks or bonds to trade. This, I believe, has given me a practical edge over others who may be applying for the same job.

If possible, Ms. Blackmon in Human Resources needs to receive your letter by March 30. For your convenience, I've enclosed a preaddressed, stamped envelope.

I appreciate your time and effort in writing this letter of recommendation for me. It will be great to put my education to work, and I'll keep you informed of my progress. Thank you for your consideration in this matter.

Sincerely,

Joanne Tucker

Joanne Tucker

Enclosure

Tucker includes information near the opening to refresh her professor's memory.

She provides a deadline for response and includes information about the person who is expecting the recommendation.

The opening states the purpose of the letter and makes the request, assuming the reader will want to comply.

The body refers to the enclosed résumé and mentions experience that could set the applicant apart from other candidates—information the professor could use in writing the recommendation.

The close is warm and respectful.

Figure 10.2 Effective Request for a Recommendation
This writer uses a direct approach when asking for a recommendation from a former professor. Note how she takes care to refresh the professor's memory because she took the class a year and a half ago. She also indicates the date by which the letter is needed and points to the enclosure of a stamped, preaddressed envelope.

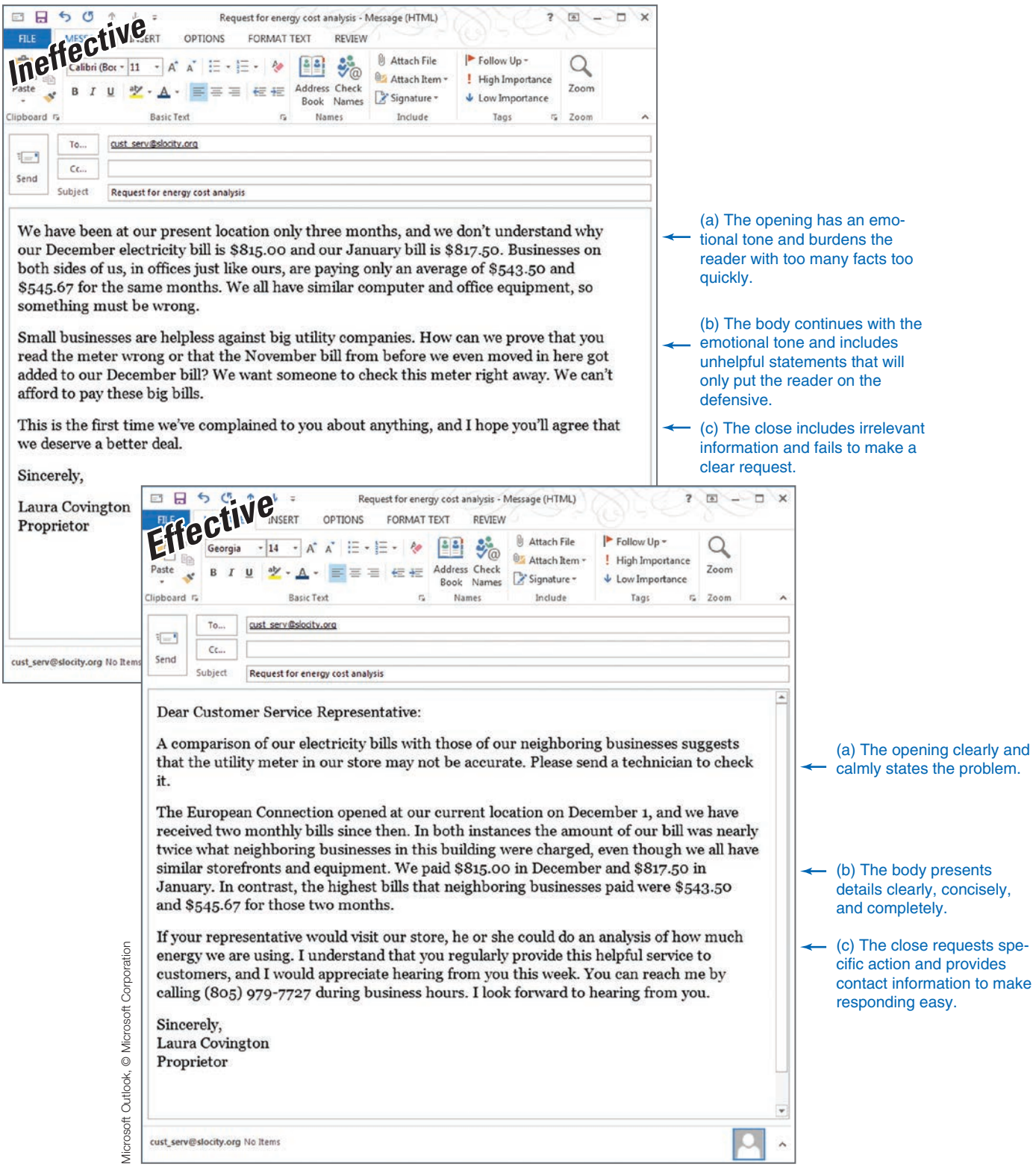


Figure 10.3 Ineffective and Effective Versions of a Claim

Note the difference in both tone and information content in these two versions. The ineffective version is emotional and unprofessional, whereas the effective version communicates calmly and clearly.

Strategy for Routine Replies, Routine Messages, and Positive Messages

3 LEARNING OBJECTIVE
Outline an effective strategy for writing routine replies, routine messages, and positive messages.

Just as you'll make numerous requests for information and action throughout your career, you'll also respond to similar requests from other people. When you are responding positively to a request, sending routine announcements, or sending a positive or goodwill message, you have several goals: to communicate the information or the good news, answer all questions, provide all required details, and leave your reader with a good impression of you and your firm.

The direct approach is an appropriate and efficient way to structure these messages because your readers will range from neutral to receptive. Whenever you have significant or unexpected negative information to share, the indirect approach is more appropriate.

If a reply or unsolicited message is unexpected and could have significant negative consequences, consider using the indirect approach instead (see Chapter 11).

OPEN WITH THE MAIN IDEA

With the direct approach, open with a clear and concise expression of the main idea or good news.

In most cases, you can get right to the point with these routine messages. Of course, you'll want to adapt your opening to the specific situation. If the message is unexpected or you haven't been in contact with the reader for a long time, a brief explanation of why you're writing is appropriate.

Even with the direct approach, it's often helpful to open with a few words of "socializing" before getting to your main idea.

Depending on the nature of the message, a few words of "socializing" can be a good way to foster a positive working relationship—just as you usually would do on the phone or in person. In this example, a manager is writing to let a subordinate know that her proposal has been approved. The tone is upbeat, and after a brief thanks, the writer moves directly to the good news.

> Hi Olivia,
>
> Thanks for your proposal to improve our employee orientation process. You've made some great suggestions, and I will meet with the HR team this week to plan how we can implement your ideas.

ETHICS DETECTIVE

Solving the Case of the Imaginary Good News

To deal with a growing problem of employee turnover, your company recently hired a research firm to survey employees to find out why more of them have been leaving than in past years. You and a colleague were assigned to work with the consultants and present their findings to upper management. Neither one of you welcomed the assignment because you suspect you'll have to present information that is critical of the management team.

As you feared, the researchers deliver a mixture of news that is mostly negative:

- Seventy-eight percent of employees believe management cares more about profits than people.
- Fifty-five percent aren't sure what's expected of them anymore.
- Forty percent believe wages at the company have not kept up with the industry average.
- Thirty-eight percent think management has done a good job of responding to competitive advances.
- Fifty-two percent expect to finish their careers at the company.
- Eighty percent believe the economy is too slow to support a productive job search.

While you're poring over the report, trying to figure out how you'll present the information tomorrow, an instant message from the CEO pops up on your partner's computer, asking for a quick summary of the results. Your partner types the following and then asks you to review it before she sends it:

> As you'd expect in a no-holds-barred investigation like this, the researchers did uncover some areas for improvements. The good news: Only 20 percent of the workforce is even considering other options, and we could reasonably expect that only a fraction of that group will leave anytime soon.

ANALYSIS

1. You read your partner's summary twice, but something doesn't feel quite right. Does it present an accurate summary of the research? Why or why not? What's likely to happen when you present the complete research results to the CEO after first sending this IM?

In the following example, the customer service manager of a blog-hosting company is alerting customers about a potential disruption of service:

> Dear customer:
>
> To maintain the high level of reliability you've come to expect from SpiderHost, we are transitioning our hosting platform to a new cloud-based architecture. The change will take place this Saturday between 1:00 a.m. and 3:00 a.m., and your site may be unavailable for a brief period during the switchover.

In both examples, the writer gets to the point quickly after a brief introduction that establishes the context of the message and works to promote a positive relationship with the reader.

PROVIDE NECESSARY DETAILS AND EXPLANATION

Use the body of the message to expand on the main idea from the opening, as needed.

Use the body to expand on the opening so that readers get all the information they need. As you provide the details, maintain the supportive tone established in the opening. The writer in the previous example might continue by explaining how the change will help customers and what they can expect during the transition:

> With this new architecture, we will be able to expand bandwidth at the flip of a switch whenever blog traffic increases. Even if traffic to your site jumps literally overnight, we can keep delivering as much bandwidth as you need.
>
> We are staging the switchover in a way that should minimize downtime for customer sites, and we don't expect any site to be unavailable for more than two or three seconds. If people do visit your site during that narrow window, they will see a message asking them to try again in a moment or two.

If you are communicating with a customer, you might also want to use the body of your message to assure the person of the wisdom of his or her purchase selection (without being condescending or self-congratulatory). Using such favorable comments, often known as *resale*, is a good way to build customer relationships. These comments are commonly included in acknowledgments of orders and other routine announcements to customers, and they are most effective when they are short and specific:

> The KitchenAid mixer you ordered is our best-selling model. It should meet your cooking needs for many years.

END WITH A COURTEOUS CLOSE

Use the close to make sure readers have all the information they need in order to take action or otherwise respond to the message.

The close of routine replies, routine messages, and positive messages is usually short and simple because you're leaving things on a neutral or positive note and not usually asking for the reader to do anything. Often, a simple thank you is all you need. If follow-up action is required or expected, use the close to identify who will do what and when that action will take place. For a quick reminder of the steps involved in writing routine replies and positive messages, see "Checklist: Writing Routine Replies and Positive Messages."

CHECKLIST Writing Routine Replies and Positive Messages

A. Start with the main idea.
- Be clear and concise.
- Identify the single most important message before you start writing.

B. Provide necessary details and explanation.
- Explain your point completely to eliminate any confusion or lingering doubts.
- Maintain a supportive tone throughout.
- Embed negative statements in positive contexts or balance them with positive alternatives.
- Talk favorably about the choices the customer has made.

C. End with a courteous close.
- Let your readers know you have their personal well-being in mind.
- If further action is required, tell readers how to proceed and encourage them to act promptly.

Common Examples of Routine Replies, Routine Messages, and Positive Messages

4 LEARNING OBJECTIVE
Describe seven common types of routine replies and positive messages.

Most routine and positive messages fall into seven categories: answers to requests for information and action, grants of claims and requests for adjustment, recommendations, routine information, instructions, good-news announcements, and goodwill messages.

ANSWERING REQUESTS FOR INFORMATION AND ACTION

Every professional answers requests for information or action from time to time. If the response is straightforward, the direct approach is appropriate. Keep the message brief and confirm any expectations, such as when you will provide information or perform a task. If you need to give an unexpected negative response to a request, consider the indirect approach covered in Chapter 11. For positive responses, a prompt, gracious, and thorough response will enhance how people think about you and the organization you represent. When you're answering requests from a potential customer or other decision-maker, look for subtle and respectful ways to encourage a decision in your favor.

GRANTING CLAIMS AND REQUESTS FOR ADJUSTMENT

Responding to mistakes in a courteous, reader-focused way helps repair important business relationships.

Even the best-run companies make mistakes, and each of these events represents a turning point in your relationship with your customer. If you handle the situation well, your customer is likely to be even more loyal than before because you've proven that you're serious about customer satisfaction. However, if a customer believes that you mishandled a complaint, the situation could get even worse. Dissatisfied customers often take their business elsewhere without notice and tell numerous friends, colleagues, and social media contacts about the negative experience. A transaction worth only a small amount by itself could cost you many times that in lost business.

Your response to a customer complaint depends on your company's policies for resolving such issues and your assessment of whether the company, the customer, or some third party is at fault. In general, take the following steps:

- Acknowledge receipt of the customer's claim or complaint.
- Sympathize with the customer's inconvenience or frustration.
- Take (or assign) personal responsibility for setting matters straight.
- Explain precisely how you have resolved or plan to resolve the situation.
- Take steps to repair the relationship.
- Follow up to verify that your response was correct.

Be sure to maintain a professional demeanor with these messages. Don't blame colleagues, don't make exaggerated apologies, don't imply that the customer is at fault, and don't promise more than you can deliver.

MOBILE APP
Send Anywhere is a secure file-transfer app that lets you send files of any size.

Communication about a claim is a delicate matter when the customer is clearly at fault. Follow company guidelines, if applicable. If the decision is up to you, carefully weigh the cost of complying with the request against the cost of denying it, and then decide how to respond based on the overall impact on your company. If you choose to grant the claim, open with that good news. The body needs special attention, however, because you want to discourage similar claims in the future. Close in a courteous manner that expresses your appreciation for the customer's business (see Figure 10.4 on the next page).

To grant a claim when the customer is at fault, try to discourage future mistakes without insulting the customer.

If a third party, such as a retailer or shipping company, is at fault, your response should follow your company's policy for dealing these claims and requests for adjustment.

See "Checklist: Granting Claims and Adjustment Requests" to review the tasks involved in these kinds of business messages.

PROVIDING RECOMMENDATIONS AND REFERENCES

Letters of recommendation used to be a fairly routine matter, but employment recommendations and references have raised some complex legal issues in recent years. Employees have sued employers and individual managers for providing negative information or refusing to provide letters of recommendation, and employers have sued other employers for failing to disclose negative information about job candidates. Before you write a letter of recommendation for a former employee or provide information in response to another employer's background check, it is vital that you understand your company's policies. Your firm may refuse to provide anything more than dates of employment and other basic details, for example.[3]

Recommendation letters are vulnerable to legal complications, so consult your company's legal department before writing one.

If you decide to write a letter of recommendation or respond to a request for information about a job candidate, your goal is to convince readers that the person being recommended has the characteristics necessary for the job, assignment, or other objective the person is seeking. A successful recommendation letter contains a number of relevant details (see Figure 10.5 on page 293):

- The candidate's full name
- The position or other objective the candidate is seeking
- The nature of your relationship with the candidate
- Facts and evidence relevant to the candidate and the opportunity
- A comparison of this candidate's potential with that of peers, if available
- Your overall evaluation of the candidate's suitability for the opportunity

Keep in mind that every time you write a recommendation, you're putting your own reputation on the line. If the person's shortcomings are so pronounced that you don't think he or she is a good fit for the job, the only choice is to not write the letter at

CHECKLIST ✓ Granting Claims and Adjustment Requests

A. Responding when your company is at fault

- Be aware of your company's policies in such cases before you respond.
- For serious situations, refer to the company's crisis management plan.
- Start by acknowledging receipt of the claim or complaint.
- Take or assign personal responsibility for resolving the situation.
- Sympathize with the customer's frustration.
- Explain how you have resolved the situation (or plan to).
- Take steps to repair the customer relationship.
- Verify your response with the customer, and keep the lines of communication open.

B. Responding when the customer is at fault

- Weigh the cost of complying with or refusing the request.
- If you choose to comply, open with the good news.
- Use the body of the message to respectfully educate the customer about steps needed to avoid a similar outcome in the future.
- Close with an appreciation for the customer's business.

C. Responding when a third party is at fault

- Follow your company's policy for handling these situations.

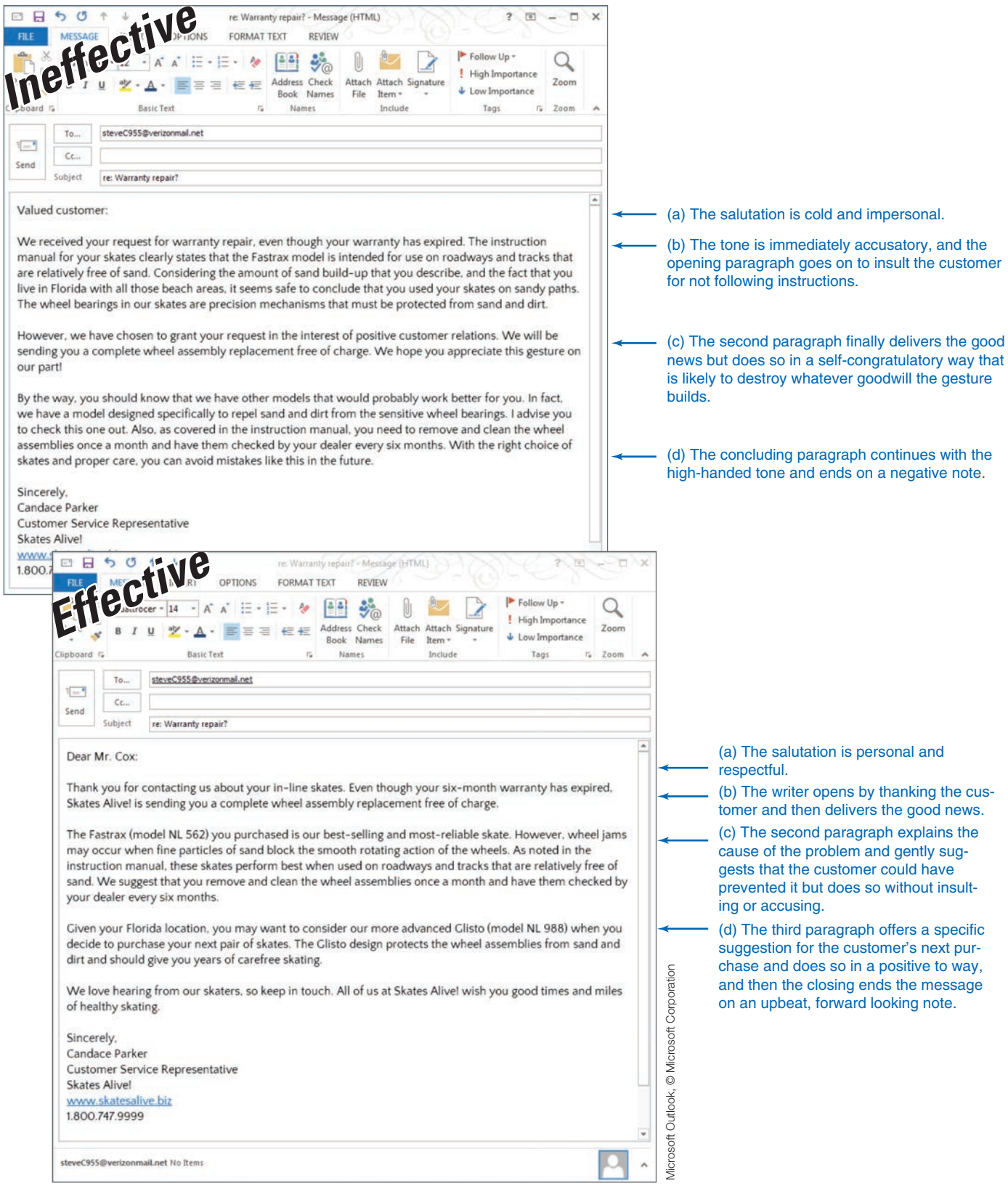
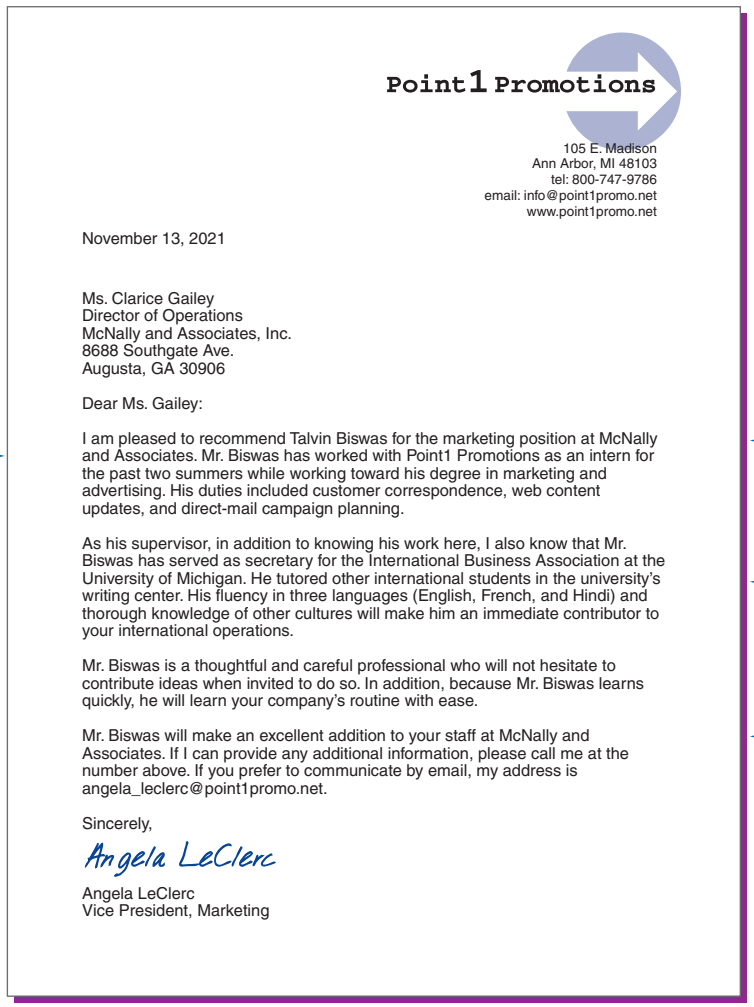


Figure 10.4 Responding to a Claim When the Buyer Is at Fault

Responding to a claim when the buyer is at fault is a positive gesture, so the content and tone of the message need to reflect that. After all, there's no point in fostering a positive relationship through actions but then undermining that through negative communication. Notice how the ineffective version sounds like a displeased parent who gives in to a child's demand but sends a mixed message by being highly critical anyway. The effective version is much more subtle, letting the customer know how to take care of his skates, without blaming or insulting him.



Point1 Promotions

105 E. Madison
Ann Arbor, MI 48103
tel: 800-747-9786
email: info@point1promo.net
www.point1promo.net

November 13, 2021

Ms. Clarice Gailey
Director of Operations
McNally and Associates, Inc.
8688 Southgate Ave.
Augusta, GA 30906

Dear Ms. Gailey:

I am pleased to recommend Talvin Biswas for the marketing position at McNally and Associates. Mr. Biswas has worked with Point1 Promotions as an intern for the past two summers while working toward his degree in marketing and advertising. His duties included customer correspondence, web content updates, and direct-mail campaign planning.

As his supervisor, in addition to knowing his work here, I also know that Mr. Biswas has served as secretary for the International Business Association at the University of Michigan. He tutored other international students in the university's writing center. His fluency in three languages (English, French, and Hindi) and thorough knowledge of other cultures will make him an immediate contributor to your international operations.

Mr. Biswas is a thoughtful and careful professional who will not hesitate to contribute ideas when invited to do so. In addition, because Mr. Biswas learns quickly, he will learn your company's routine with ease.

Mr. Biswas will make an excellent addition to your staff at McNally and Associates. If I can provide any additional information, please call me at the number above. If you prefer to communicate by email, my address is angela_leclerc@point1promo.net.

Sincerely,

Angela LeClerc

Angela LeClerc
Vice President, Marketing

LeClerc specifies the duration and nature of the relationship to give credibility to her evaluation.

The opening clearly states the candidate's full name and the specific purpose of the letter.

The body continues with specific examples to support the writer's positive evaluation.

The close summarizes the writer's recommendation and invites further communication.

Figure 10.5 Effective Recommendation Letter
This letter clearly states the nature of the writer's relationship to the candidate and provides specific examples to support the writer's endorsements.

all. Unless your relationship with the person warrants an explanation, simply suggest that someone else might be in a better position to provide a recommendation. (For more advice on turning down requests for recommendations, see pages 325–326.)

SHARING ROUTINE INFORMATION

Many messages involve sharing routine information, such as project updates and order status notifications. Use the opening of these routine messages to state the purpose and briefly mention the nature of the information you are providing. Give the necessary details in the body and end your message with a courteous close.

Most routine communications like this are neutral, so you don't need to take special steps in anticipation of emotional reactions from readers. However, make sure you've considered the likely response of all your readers and take steps to address the full range of reactions. For example, announcing that the company is opening an on-site daycare facility will likely be welcome news to those employees who have children. But what if employees without children feel it is unfair to spend money on a benefit that helps some workers but not others? These employees might prefer help with elder care or some other need, for example. If you anticipate a mixed reaction, looks for ways to put the news is a positive context for everyone—such as pointing out that the day care will reduce the amount of time parents need to take off from work, which will reduce the workload burden on everyone else.

When sharing routine information

- State the purpose at the beginning and briefly mention the nature of the information you are providing.
- Provide the necessary details.
- End with a courteous close.

WRITING INSTRUCTIONS

Writing instructions for employees or customers is another common communication task. For major projects such as user manuals, companies often employ specialist technical writers, but you could be involved in writing shorter instructions on a variety of topics. Follow these steps to create clear and effective instructions on any topic:

To write effective instructions on any subject, start by figuring out how much your intended readers are likely to know about topic or process.

1. Make sure you understand how much your readers know about the subject. A common mistake when writing instructions is to assume too much knowledge or experience on the part of readers.
2. Provide an overview of the procedure. Explain what users will be doing, and identify any information or tools they will need to complete the procedure.
3. Define any technical terms or acronyms that readers need to understand.
4. Divide the procedure into discrete steps, with each step focusing on a single task.
5. Tell readers what to expect when they complete each step so they know they've done it correctly (for example, "If the green LED is on, you've made a secure connection").
6. Test the instructions on someone from the target audience.
7. Whenever possible, provide a way for readers to ask for help.

ANNOUNCING GOOD NEWS

To develop and maintain good relationships, smart companies recognize that it's good business to spread the word about positive developments. Such developments can include opening new facilities, hiring a new executive, introducing new products or services, or sponsoring community events. Because good news is always welcome, use the direct approach (see Figure 10.6).

A *news release* or press release is a message designed to share information with the news media, although many are now written with customers and other stakeholders in mind as well.

External good-news announcements are often communicated in a **news release**, also known as a *press release*, a specialized document used to share relevant information with the news media. (News releases are also used to announce negative news, such as plant closings.) In most companies, news releases are usually prepared or at least supervised by specially trained writers in the public relations department. The content follows the customary pattern for a positive message: good news followed by details and a positive close. However, traditional news releases have a critical difference: You're not writing directly to the ultimate audience (such as the readers of a blog or newspaper); you're trying to spark the interest of an editor, reporter, blogger, or other intermediary in the hope that person will write a piece that carries your message to a larger audience.

News releases often include share-ready content that is easy to reuse in blog posts, tweets, and other social media formats.

Traditionally, news releases were crafted in a way to provide information to reporters, who would then write their own articles if the subject matter was interesting to their readers. However, the nature of the news release is changing. Many companies now view it as a general-purpose tool for communicating directly with customers and other audiences, creating *direct-to-consumer news releases*.[4]

If you write or approve a news release, be sure it takes advantage of social media capabilities, including links to your company's social networking profiles, "tweetables" (Twitter-ready statements that can be shared on Twitter by clicking or tapping a single button), and other shareable content.

FOSTERING GOODWILL

Goodwill is the positive feeling that encourages people to maintain a business relationship.

All business messages should be written with an eye toward fostering positive relationships with audiences, but some messages are written specifically to build goodwill. You can use these messages to enhance your relationships with customers, colleagues, and other businesspeople by sending friendly, even unexpected, notes with no direct business purpose. The small effort to send a goodwill message can have a positive and lasting effect on the people around you.

Sending Congratulations

Offering congratulations to companies or individuals for significant achievements is a good opportunity to build goodwill.

One prime opportunity for sending goodwill messages is to congratulate individuals or companies for significant business achievements. Other reasons for sending congratulations include highlights in people's personal lives, such as weddings, births, graduations,



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Figure 10.6 Announcing Good News
News releases, which can be aimed at both the news media and consumers in general, are a common way to announce good news.

DEVELOPING AS A PROFESSIONAL

Maintaining a Confident, Positive Outlook

Spend a few minutes around successful people in any field, and chances are you'll notice how optimistic they are. They believe in what they're doing, and they believe in themselves and their ability to solve problems and overcome obstacles.

Being positive doesn't mean displaying mindless optimism or spewing happy talk all the time. It means acknowledging that things may be difficult but then buckling down and getting the job done anyway. It means no whining and no slacking off, even when things are tough. We live in an imperfect world, no question; jobs can be boring or difficult, customers can be unpleasant, and bosses can be unreasonable. But when you're a pro, you find a way to power through.

Your energy, positive or negative, is contagious. Both in person and online, you'll spend as much time with your colleagues as you spend with family and friends. Personal demeanor is therefore a vital element of workplace harmony. No one expects (or wants) you to be artificially upbeat and bubbly every second of the day, but one negative personality can make an entire office miserable and unproductive. Every person in a company has a responsibility to contribute to a positive, energetic work environment.

CAREER APPLICATIONS

1. Do you have an ethical obligation to maintain a positive outlook on the job? Why or why not?
2. How can you lift your spirits when work is dragging you down?

and success in nonbusiness competitions. You may congratulate business acquaintances on their own achievements or on the accomplishments of a family member. You may also take note of personal events, even if you don't know the reader well. If you're already friendly with the reader, a more personal tone is appropriate.

Sending Messages of Appreciation

An effective message of appreciation documents a person's contributions.

An important leadership quality is the ability to recognize the contributions of employees, colleagues, suppliers, and other associates. Your praise does more than just make the person feel good; it encourages further excellence. A message of appreciation may also become an important part of someone's personnel file or business-building portfolio, and specific information is particularly helpful in this regard because it provides proof of performance (see Figure 10.7).

Offering Condolences

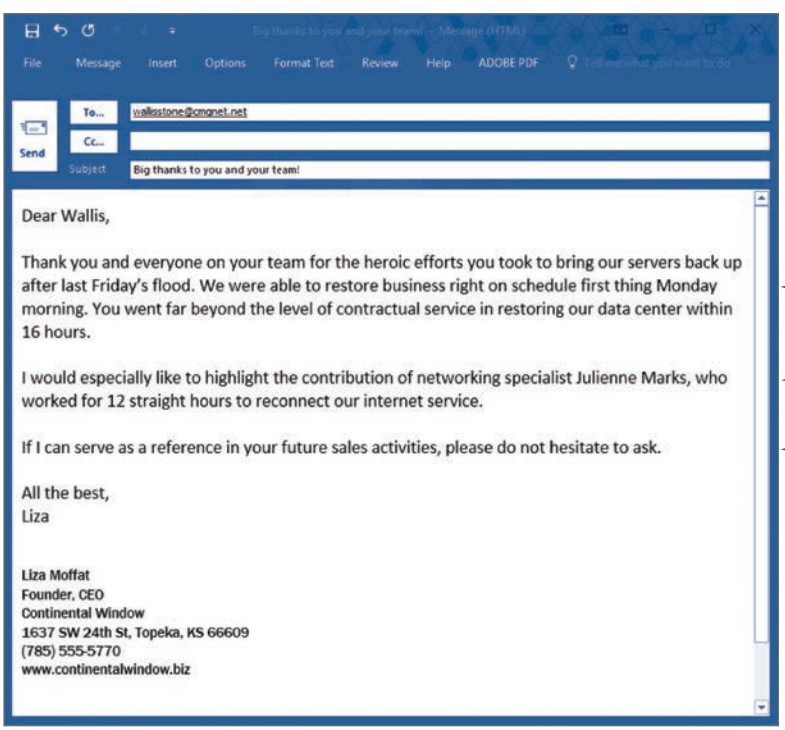
The primary purpose of *condolence letters* is to express sympathy for someone's loss.

Condolence letters are brief personal messages written to comfort someone after the death of a loved one. You may have occasion to offer condolences to employees or other business associates (when the person has lost a family member) or to the family of an employee or business associate (when that person has died).

These messages can feel intimidating to write, but they don't need to be. Follow these three principles: short, simple, and sincere. You don't need to produce a work of literary art; the fact that you are writing sends a message that is as meaningful as anything you can say.

Timing and media choice are important considerations with condolence letters. The sooner your message is received, the more comforting it will be, so don't delay. And unless circumstances absolutely leave you no choice, avoid using email or another digital medium. A brief, handwritten note on quality stationery or a tasteful card is the way to go.

Open a condolence message with a simple expression of sympathy, such as "I am deeply sorry to hear of your loss" or "I am sorry for your loss." How you continue from there depends on the circumstances and your relationship with the deceased and the



Microsoft Outlook, © Microsoft Corporation

Figure 10.7 Goodwill Messages
All business messages should try to build goodwill, of course, but some messages are written primarily to foster goodwill rather than to accomplish a specific business purpose.

person to whom you are writing. For example, if you are writing to the husband of a colleague who recently died and you have never met him, you might continue with "Having worked with Janice for more than a decade, I know what a kind and caring person she was." Such a statement accomplishes two goals: explaining why you in particular are writing and letting the recipient know that his loved one was appreciated in the workplace.

Conversely, if you are writing to a colleague who recently lost a loved one, you might continue with "After meeting Warren at last year's company picnic and hearing your stories about his involvement with your son's soccer league and the many other ways he contributed to his community, I know what a special person he was." Sharing brief and positive memories like this adds meaning and depth to your expression of sympathy.

You can conclude with a simple statement such as "My thoughts are with you during this difficult time." If appropriate for the situation and your relationship, you might also include an offer of assistance. "Please call if there is anything I can do for you."

As you decide what to include in the message, keep two points in mind. First, make it a personal expression of sympathy, but don't make the whole message about you and your sense of loss. You might be grieving as well, but unless you, the deceased, and the reader were all personally close, don't say things like "I was so devastated to hear the news about Kalinda."

Second, don't offer "life advice," and don't include trite sayings that you may have heard or read. At this point, soon after the loss, the recipient probably doesn't want your advice, only your sympathy. Also, don't bring religion into the discussion unless you have a close personal relationship with the recipient and religion is already a part of your relationship. Otherwise, you risk offending with unwelcome or inappropriate sentiments.

Condolence letters are the most personal business messages you may ever have to write, so they require the utmost in care and respect for your reader. By keeping the messages short, simple, and sincere, you will be able to achieve the right tone.

To review the tasks involved in writing goodwill messages, see "Checklist: Sending Goodwill Messages."

MOBILE APP

If you want the convenience or personal touch of handwriting but need to work in a digital format, **INKredible** makes it easy to save and share your notes.

Keep your condolence message focused on the recipient, not on your own emotions, and don't offer "life advice" or trite sayings.

CHECKLIST ✓ Sending Goodwill Messages

- Be sincere and honest.
- Don't exaggerate or use vague, grandiose language; support positive statements with specific evidence.
- Use congratulatory messages to build goodwill with clients and colleagues.
- Send messages of appreciation to emphasize how much you value the work of others.
- When sending condolence messages, open with a brief statement of sympathy, and then adapt your message based on the circumstances and your relationship with the recipient.

COMMUNICATION CHALLENGES AT Productivity Report

You've joined *Productivity Report* as a freelance researcher and writer, helping Jill Duffy educate technology users on productivity and effective workplace communication. Use what you've learned in this and previous chapters to address these challenges.

INDIVIDUAL CHALLENGE: You've probably seen the acronym *tl;dr* in online discussions, which means "too long; didn't read." Web surfers, particularly those who are accessing content on mobile devices, crave concise articles they can absorb in a minute or two (maybe three). Find one of the articles in the Productivity category on *Productivity Report* and summarize it in 250 to 300 words—roughly what the average adult can read in one minute.

TEAM CHALLENGE: Duffy wrote a series of articles for *Productivity Report* titled "What's Wrong with Email" from which she would like to extract a series of "tweetable" teasers. Find these articles on the website and divide them among the members of your team. Evaluate each article and find three to five key points that you can convey as tweets. Assemble your collection of tweetables in a brief report, including one introductory tweet for the whole series.

Key Terms

adjustment The settlement of a claim
claim A formal complaint made in response to dissatisfaction over a product or service
condolence letters Brief personal messages written to comfort someone after the death of a loved one
news release Also known as a *press release*, a specialized document traditionally used to share relevant information with the local or national news media; today, many companies issue news releases directly to the public as well

Summary of Learning Objectives

1 Outline an effective strategy for writing routine business requests. When writing a routine request, open by stating your specific request. Use the body to justify your request and explain its importance. Close routine requests by asking for specific action (including a deadline, if appropriate) and expressing goodwill. A courteous close contains three important elements: (1) a specific request, (2) information about how you can be reached (if it isn't obvious), and (3) an expression of appreciation or goodwill.

2 Describe three common types of routine requests. The most common types of routine messages are asking for information or action, asking for recommendations, and making claims and requesting adjustments. Requests for information or action should explain what you want to know or what you want readers to do, why you're making the request, and why it may be in your readers' interest to help you (if applicable). Requests for recommendations should open by stating what it is you are requesting and asking the recipient to write the message in question. The body should list all the information the recipient would need to write the recommendation (refer to an attached résumé, if applicable). The close should contain an expression of appreciation and a deadline, if applicable. To make a claim (a formal complaint about a product or service) or request an adjustment (a settlement of a claim), open with a straightforward statement of the problem, use the body to give a complete explanation of the situation, and close with a polite request to resolve the situation.

3 Outline an effective strategy for writing routine replies, routine messages, and positive messages. The direct approach works well for routine replies, routine messages, and positive messages because recipients will generally be interested in what you have to say. Place your main idea (the positive reply or the good news) in the opening. Use the body to explain all the relevant details, and close cordially, perhaps highlighting a benefit to your reader.

4 Describe seven common types of routine replies and positive messages. Most routine and positive messages fall into seven categories: answers to requests for information and action, grants of claims and requests for adjustment, recommendations, routine information, instructions, good-news announcements, and goodwill messages. Providing answers to requests for information or action is a simple task, often assisted with form responses that can be customized as needed. Granting claims and requests for adjustments is more complicated, and the right response depends on whether the company, the customer, or a third party was at fault. Recommendations also require a careful approach to avoid legal complications; some companies prohibit managers from writing recommendation letters or providing anything beyond basic employment history. Informative messages are often simple and straightforward, but be sure to consider the needs and possible responses of all recipients. People may respond to the same message in different ways. Writing effective instructions starts with understand what readers know about a topic and then providing advice that helps them perform each step of the task. Good-news announcements for external audiences are often handled by news releases, which used to be sent exclusively to members of the news media but are now usually made available to the public as well. Finally, goodwill messages, meant to foster positive business relationships, include congratulations, thank-you messages, and messages of condolence. To make goodwill messages effective, make them honest, sincere, and factual.

Test Your Knowledge

To review chapter content related to each question, refer to the indicated Learning Objective.

10-1. Should you use the direct or indirect approach for most routine messages? Why? [LO-1]
10-2. Why is it good practice to explain why replying to a request could benefit the reader? [LO-1]
10-3. What information should be included in a routine request? [LO-1]
10-4. Where in a routine message should you state your actual request? [LO-1]
10-5. What information should you include in a request for a recommendation? [LO-2]
10-6. How does a claim differ from an adjustment? [LO-2]
10-7. What is resale information? [LO-3]
10-8. What is the appropriate strategy for responding to a request for a recommendation about a job candidate whose performance was poor? [LO-4]
10-9. How can you avoid sounding insincere when writing a goodwill message? [LO-4]
10-10. What are three principles to follow for writing condolence messages? [LO-4]

Apply Your Knowledge

To review chapter content related to each question, refer to the indicated Learning Objective.

10-11. You're applying for a job as a website designer at a digital marketing agency. In a previous job at another agency, you excelled at website design but you were also asked to "pitch" the agency's services to potential clients. Unfortunately, you did not do well at this aspect of the job, and you were let go when the agency had to lay off 10 percent of its staff. The new opportunity will not require you to pitch new clients.

Would it be appropriate to ask your former boss for a recommendation that focuses on your web design skills? If so, how should you approach the request? [LO-2]

10-12. The latest issue of a local business newspaper names 10 area executives who have exhibited excellent leadership skills in the past year. You are currently searching for a job, and a friend suggests that you write each executive a congratulatory letter and mention in passing that you are looking for new career opportunities and would appreciate the opportunity for an interview. Is this a smart strategy? Why or why not? [LO-4]

10-13. You've been asked to write a letter of recommendation for an employee who worked for you some years ago. You recall that the employee did an admirable job, but you can't remember any specific information at this point. Should you write the letter anyway? Explain. [LO-4]

10-14. Your company made a mistake that cost an important business customer a new client; you know it, and your customer knows it. Do you apologize, or do you refer to the incident in a positive light without admitting any responsibility? Briefly explain. [LO-4]

Practice Your Skills

Messages for Analysis

Read the following messages, and then (1) analyze the strengths and weaknesses of each sentence and (2) revise each document so that it follows this chapter's guidelines.

10-15. Message Strategies: Routine Requests [LO-2]

I'm fed up with the mistakes that our current accounting firm makes. I run a small construction company, and I don't have time to double-check every bookkeeping entry and call the accountants a dozen times when they won't return my messages. Please explain how your firm would do a better job than my current accountants. You have a good reputation among homebuilders, but before I consider hiring you to take over my accounting, I need to know that you care about quality work and good customer service.

10-16. Message Strategies: Responding to Claims and Requests for Adjustments [LO-4]

We read your letter, requesting your deposit refund. We couldn't figure out why you hadn't received it, so we talked to our maintenance engineer, as you suggested. He said you had left one of the doors off the hinges in your apartment in order to get a large sofa through the door. He also confirmed that you had paid him $5.00 to replace the door since you had to turn in the U-Haul trailer and were in a big hurry.

This entire situation really was caused by a lack of communication between our housekeeping inspector and the maintenance engineer. All we knew was that the door was off the hinges when it was inspected by Sally Tarnley. You know that our policy states that if anything is wrong with the apartment, we keep the deposit. We had no way of knowing that George just hadn't gotten around to replacing the door.

But we have good news. We approved the deposit refund, which will be mailed to you from our home office in Teaneck, New Jersey. I'm not sure how long that will take, however. If you don't receive the check by the end of next month, give me a call.

Next time, it's really a good idea to stay with your apartment until it's inspected, as stipulated in your lease agreement. That way, you'll be sure to receive your refund when you expect it. Hope you have a good summer.

10-17. Message 10.C: Message Strategies: Providing Recommendations [LO-4] (Note: Assume that your company allows you to write recommendations.)

Your letter to Kunitake Ando, president of Sony, was forwarded to me because I am the human resources director. In my job as head of HR, I have access to performance reviews for all the Sony employees in the United States. This means, of course, that I would be the person best qualified to answer your request for information on Nick Oshinski.

In your letter of the 15th, you asked about Nick Oshinski's employment record with us because he has applied to work for your company. Mr. Oshinski was employed with us from January 5, 2012, until March 1, 2020. During that time, Mr. Oshinski received ratings ranging from 2.5 up to 9.6, with 10 being the top score. As you can see, he must have done better reporting to some managers than to others. In addition, he took all vacation days, which is a bit unusual. Although I did not know Mr. Oshinski personally, I know that our best workers seldom use all the vacation time they earn. I do not know if that applies in this case.

In summary, Nick Oshinski performed his tasks well depending on who managed him.

Exercises

Each activity is labeled according to the primary skill or skills you will need to use. To review relevant chapter content, you can refer to the indicated Learning Objective. In some instances, supporting information will be found in another chapter, as indicated.

Message Strategies: Routine Requests; Revising for Conciseness [LO-1], Chapter 6 Critique the following closing paragraphs. How would you rewrite each to be concise, courteous, and specific?

10-18. I can't make heads or tails of this trip report. Did you accomplish the tasks you set out to accomplish or only some of them or none of them? I see that you visited four separate clients but instead of enumerating the outcome of each meeting in a separate way, the conclusion of your report jumbles them all together in a way that makes it impossible to determine the status of each client project. Is any management-level action required for any of these clients. If so, which ones? What action? It's impossible to tell because your report doesn't specify meeting outcomes by client, as would normally be the case in a report from someone who visited multiple client sites during a single trip.

10-19. I need your response sometime soon so I can order the parts in time for your service appointment. Otherwise,

your air-conditioning system may not be in tip-top condition for the start of the summer season.

10-20. Thank you in advance for sending me as much information as you can about your products. I look forward to receiving your package in the very near future.

10-21. To schedule an appointment with one of our knowledgeable mortgage specialists in your area, you can always call our hotline at 1-800-555-8765. This is also the number to call if you have more questions about mortgage rates, closing procedures, or any other aspect of the mortgage process. Remember, we're here to make the home-buying experience as painless as possible.

Message Strategies: Routine Responses; Media Skills: Email [LO-3], Chapter 7 Revise the following short email messages so they are more direct and concise; develop a subject line for each revised message.

10-22. I'm contacting you about your recent email request for technical support on your cable internet service. Part of the problem we have in tech support is trying to figure out exactly what each customer's specific problem is so that we can troubleshoot quickly and get you back in business as quickly as possible. You may have noticed that in the online support request form, there are a number of fields to enter your type of computer, operating system, memory, and so on. While you did tell us you were experiencing slow download speeds during certain times of the day, you didn't tell us which times specifically, nor did you complete all the fields telling us about your computer. Please return to our support website and resubmit your request, being sure to provide all the necessary information; then we'll be able to help you.

10-23. Thank you for contacting us about the difficulty you had collecting your luggage at Denver International Airport. We are very sorry for the inconvenience this has caused you. As you know, traveling can create problems of this sort regardless of how careful the airline personnel might be. To receive compensation, please send us a detailed list of the items that you lost and complete the following questionnaire. You can email it back to us.

10-24. Sorry it took us so long to get back to you. We were flooded with résumés. Anyway, your résumé made the final 10, and after meeting three hours yesterday, we've decided we'd like to meet with you. What is your schedule like for next week? Can you come in for an interview on June 15 at 3:00 p.m.? Please get back to us by the end of this workweek and let us know if you will be able to attend. As you can imagine, this is our busy season.

10-25. We're letting you know that because we use over a ton of paper a year and because so much of that paper goes into the wastebasket to become so much more environmental waste, starting Monday, we're placing white plastic bins outside the elevators on every floor to recycle that paper and in the process, minimize pollution.

Message Strategies: Routine and Positive Messages; Revising for Conciseness [LO-3], Chapter 6 Rewrite the following sentences so that they are direct and concise. If necessary, break your answer into additional sentences.

10-26. We wanted to invite you to our special 40 percent off by-invitation-only sale; the sale is taking place on November 9.

10-27. We wanted to let you know that we are giving a special-edition tote bag with every $100 donation you make to our radio station.

10-28. The director plans to go to the meeting that will be held on Monday at 11:00 a.m. but plans to arrive early to speak individually with department heads.

10-29. In today's meeting, we were happy to have the opportunity to welcome Paul Eccelson. He went over the product plans for next year. If you have any questions about these new products, feel free to call him at his office.

10-30. Message Strategies: Responding to Claims and Requests for Adjustments [LO-4] Your company markets a line of automotive accessories for people who like to "tune" their cars for maximum performance. A customer has just written a furious email, claiming that a supercharger he purchased from your website didn't deliver the extra engine power he expected. Your company has a standard refund process to handle situations such as this, and you have the information you need to inform the customer about that. You also have information that could help the customer find a more compatible supercharger from one of your competitors, but the customer's email message is so abusive that you don't feel obligated to help. Is this an appropriate response? Why or why not?

10-31. Message Strategies: Writing Routine Messages; Completing: Evaluating Content, Organization, and Tone [LO-4], Chapter 6 Analyze the strengths and weaknesses of this message, and then revise it so that it follows this chapter's guidelines for sharing routine information, including using the direct approach:

> Those of you who read the business media might have heard about job enlargement (expanding the scope of a job horizontally), job enhancement (expanding the scope of a job vertically), and job rotation (training employees to handle more than one job) as ways to make work more fulfilling and to increase staffing flexibility. All three have pros and cons, and the management team has thought about each one carefully. We particularly like the concept of job enlargement, which lets employees take on gradually more and more responsibilities from their immediate supervisors.
>
> Job rotation is the one we've decided to implement starting next quarter. The reasons are because it makes work more interesting and challenging because you're always learning, and it makes life easier for managers because they have a wide pool of trained talent to throw at every new challenge and opportunity. We have analyzed all the job categories in the plant and identified the most appropriate cross-training opportunities (job rotation is also called cross-training, by the way).
>
> Follow the link below to identify your current job title; then check out the specific cross-training opportunities you can choose from. Then prioritize your first, second, and third choices (if your job has more than one listed) for job rotation. Please make your choices by April 10. This gives you plenty of time to discuss the possibilities with your supervisor and discuss the nature of each job with people who are already

performing it. Please note also that we are asking all non-management employees to identify their preferences, so this is not optional.

10-32. **Message Strategies: Writing Positive Messages; Media Skills: Microblogging [LO-4], Chapter 8** Locate an online announcement for a new product you find interesting or useful. Read enough about the product to be able to describe it to someone else in your own words and then writer four Twitter tweets: one to introduce the product to your followers and three follow-on tweets that describe three particularly compelling features or benefits of the product.

10-33. **Message Strategies: Writing Goodwill Messages [LO-4]** Identify someone in your life who has recently accomplished a significant achievement, such as graduating from high school or college, completing a major project, or winning an important professional award. Write a brief congratulatory message using the guidelines presented in the chapter.

Expand Your Skills

Critique the Professionals

Locate an online example of a news release in which a company announces good news, such as a new product, a notable executive hire, an expansion, strong financial results, or an industry award. Analyze the release using the guidance provided in the chapter. In what ways did the writer excel? What aspects of the release could be improved? Does the release provide social media–friendly content and features? Using whatever medium your instructor requests, write a brief analysis of the piece (no more than one page), citing specific elements from the piece and support from the chapter.

Sharpening Your Career Skills Online

Find a website, video, article, podcast, or PowerPoint presentation that offers advice on writing goodwill messages such as thank-you notes or congratulatory letters. Write a brief email message to your instructor, describing the item that you found and summarizing the career skills information you learned from it.

Build Your Career

One of the biggest challenges of the interviewing and hiring process from the employer's perspective is figuring out whether a candidate's general qualifications will fit the specific requirements of a job opening. For example, you may have a degree in marketing or accounting, but marketing and accounting jobs can vary widely from one company to the next. The levels of responsibility may differ, companies use different procedures and systems, and so on. Employers don't look for a generic marketing specialist or a generic accountant; they look for people who can meet their specific and unique needs. In addition, even companies in the same industry can have dramatically different competitive threats and other issues they need help with.

To maximize your appeal as a candidate, you need to translate your general qualifications into the specific needs a company has. The secret is research. As you encounter interesting job openings in the coming months, practice figuring out what you would need to know in order to sell yourself into each job. Study the job descriptions, and read about the company and its industry. What *specific* qualities, skills, and knowledge does the company need? Not just "promoting its products" but "promoting the Panasonic Professional 4K line of camcorders to semi-pro and professional videographers," for example. Dig down to individual product lines, target markets, or whatever variables fit the job. By the time you're ready to apply for your dream job, you'll know how to present yourself as the dream candidate.

Cases

For all cases, feel free to use your creativity to make up any details you need to craft effective messages.

Routine Requests

BLOGGING SKILLS

10-34. Message Strategies: Requesting Information [LO-2] You are writing a book about the advantages and potential pitfalls of using online collaboration systems for virtual team projects. You would like to include several dozen real-life examples from people in a variety of industries. Fortunately, you publish a highly respected blog on the subject, with several thousand regular readers.

Your task: Write a post for your blog that asks readers to submit brief descriptions of their experiences using collaboration tools for team projects. Ask them to email stories of how well a specific system or approach worked for them. Explain that they will receive an autographed copy of the book as thanks and that they will need to sign a release form if their stories are used. In addition, emphasize that you would like to use real names—of people, companies, and software—but you can keep the anecdotes anonymous if readers require. To stay on schedule, you need to have these stories by May 20.

MESSAGING SKILLS

10-35. Message Strategies: Routine Requests [LO-2] One of the reasons you accepted the job offer from your current employer was the happy, relaxed vibe of the open-plan office. When you interviewed, it seemed as far away from a boring, conventional "cubicle farm" as you could get, which

appealed to your nonconformist instincts. After a year in the job, however, you've experienced some of the disadvantages of the company's relaxed attitudes to just about every aspect of workplace behavior. People routinely bring pets to work, even though several people have explained they have allergies to dogs or cats. Some of the pets are less than ideally behaved, too, and a couple of dogs who are frequent visitors get into snarling matches when they see each other. One person even brings a pet bird, which has been known to fly loose around the office. Employees bring children of all ages to work, too, from infants still in diapers to teenagers who play video games on mobile devices—sometimes using headphones but sometimes not. Music lovers get into volume wars at least once a week, trying to drown each other out on their portable speaker systems.

You wonder how anybody can get any work done, until you privately interview several colleagues and realize that, like you, they aren't getting any work done either. The office has become such a festival of distractions that people routinely bring work home on nights and weekends because home is the only place they can concentrate.

Your task: Write a brief request that could be sent out via the company's internal messaging system, asking people to consider the needs of their colleagues before bringing pets, children, and other potential distractions into the workplace.

EMAIL SKILLS

10-36. Message Strategies: Routine Requests [LO-2] After your company rolled out a new online collaboration system several weeks ago, you began to worry that your eyesight was failing. You had to squint to read posted messages, and the file archive was almost impossible to navigate because you couldn't read the file names. But then you noticed people in the department you manage having the same problem, particularly people who work on laptops and tablets.

You wondered how the programmers in the information technology (IT) department who configured the system failed to notice the problem, until you walked through their department and realized they all had multiple, giant computer monitors. Everything on their screens was displayed in large, easily readable type.

Your task: Write a brief email message to the head of IT, asking her group to meet with users in your department to discuss the question of on-screen readability with the new system.

EMAIL SKILLS

10-37. Message Strategies: Requesting a Recommendation [LO-2] One of your colleagues, Katina Vander, was recently promoted to department manager and now serves on the company's strategic planning committee. At its monthly meeting next week, the committee will choose an employee to lead an important market research project that will help define the company's product portfolio for the next five years.

You worked side by side with Vander for five years, so she knows your abilities well and has complimented your business insights on many occasions. You know that because she has only recently been promoted to manager, she needs to build credibility among her peers and will therefore be cautious about making such an important recommendation. On the other hand, making a stellar recommendation for such an important project would show that she has a good eye for talent—an essential leadership trait.

Your task: Write an email message to Vander, telling her that you are definitely interested in leading the project and asking her to put in a good word for you with the committee. Mention four attributes that you believe would serve you well in the role: a dozen years of experience in the industry, an engineering degree that helps you understand the technologies involved in product design, a consistent record of excellent or exceptional ratings in annual employee evaluations, and the three years you spent working in the company's customer support group, which gave you a firsthand look at customer satisfaction and quality issues.

MESSAGING SKILLS

10-38. Message Strategies: Requesting Information [LO-2] Many companies now provide presales and postsales customer support through some form of instant messaging or online chat function. As a consumer looking for information, you'll get better service if you can frame your requests clearly and succinctly.

Your task: Imagine that you need to replace your old laptop computer, but you're not sure whether to go with another laptop or switch to a tablet or perhaps one of the new tablet/laptop hybrids. Think through the various ways you will use this new device, from researching and note taking during class to watching movies and interacting with friends on social media. Now imagine you're in a chat session with a sales representative from a computer company, and this person has asked how he or she can help you. Draft a message (no more than 100 words) that summarizes your computing and media requirements and asks the representative to recommend the right type of device for you.

MESSAGING SKILLS

10-39. Message Strategies: Requesting Information [LO-2] The vast Consumer Electronics Show (CES) is the premier promotional event in the industry. Nearly 200,000 industry insiders from all over the world come to see the exciting new products on display from thousands of companies—everything from video game gadgets to sports technology to smart robots.[5] You've just stumbled on a video game controller that has a built-in webcam to allow networked gamers to see and hear each other while they play. Your company also makes game controllers, and you're worried that your customers will flock to this new controller-cam. You need to know how much buzz around this new product is circulating through the show: Have people seen it? What are they saying about it? Are they excited about it?

Your task: Compose a text message to your colleagues at the show, alerting them to the new controller-cam and asking them

to listen for any buzz it might be generating among the attendees at the Las Vegas Convention Center and the several surrounding hotels where the show takes place. Your team has a lot of messages flying around during the show, so keep yours under 200 characters.

EMAIL SKILLS

10-40. Message Strategies: Requesting an Adjustment [LO-2] Love at first listen is the only way to describe the way you felt when you discovered the music-streaming service SongThrong. You enjoy dozens of styles of music, from Afrobeat and Tropicalia to mainstream pop and the occasional blast of industrial metal, and SongThrong has them all for only $9.99 a month. You can explore every genre imaginable, listening to as many tracks as you like for a fixed monthly fee. The service sounded too good to be true—and sadly, it was. The service was so unreliable that you began keeping note of when it was unavailable. Last month, it was down for all or part of 12 days—well over a third of the month. As much as you like it, you've had enough.

Your task: Write an email to support@songthrong.com, requesting a full refund. To get the $9.99 monthly rate, you prepaid for an entire year ($119.88), and you've been a subscriber for two months now. You know the service has been out for at least part of the time on 12 separate days last month, and while you didn't track outages during the first month, you believe it was about the same number of days.

LETTER-WRITING SKILLS

10-41. Message Strategies: Requesting an Adjustment [LO-2] As a consumer, you've probably bought something that didn't work right or paid for a service that did not turn out the way you expected. Maybe it was a pair of jeans with a rip in a seam that you didn't find until you got home or a watch that broke a week after you bought it. Or maybe your family hired a lawn service to do some yard work and no one from the company showed up on the day promised, and when the gardeners finally appeared, they did not do what they'd been hired for but instead did other things that wound up damaging valuable plants.

Your task: Choose an incident from your own experience and write a claim letter, asking for a refund, repair, replacement, or other adjustment. You'll need to include all the details of the transaction, plus your contact address and phone number. If you can't think of such an experience, make up details for an imaginary situation. If your experience is real, you might want to mail the letter. The reply you receive will provide a good test of your claim-writing skills.

EMAIL SKILLS

10-42. Message Strategies: Requesting Action [LO-2] You head up marketing for Nordstrom's instore sales. Assume the company has decided to launch a new store-within-a-store concept, in which a small section of each store will showcase "business casual" clothing. To ensure a successful launch of this new strategy, you want to get input from the best retailing minds in the company. You also know it's important to get regional insights from around the country because a merchandising strategy that works in one area might not succeed in another.

Your task: Write an email message to the company's managers, asking them to each nominate one person to serve on an advisory team (managers can nominate themselves if they are local market experts). Explain that you want to find people with at least five years of retailing experience, a good understanding of the local business climate, and thorough knowledge of the local retail competition. In addition, the best candidates will be good team players who are comfortable collaborating long distance using virtual meeting technologies. Also, explain that while you are asking each of the 119 stores to nominate someone, the team will be limited to no more than eight people. You've met many of the store managers, but not all of them, so be sure to introduce yourself at the beginning of the message.

Routine Messages

EMAIL SKILLS

10-43. Message Strategies: Granting Claims [LO-4] Your company sells flower arrangements and gift baskets. Holidays are always a rush, and the overworked staff makes the occasional mistake. Last week, somebody made a big one. As a furious email message from a customer named Anders Ellison explains, he ordered a Valentine's Day bouquet for his wife, but the company sent a bereavement arrangement instead.

Your task: Respond to Ellison's email message, apologizing for the error, promising to refund all costs that Ellison incurred, informing him that the correct arrangement will arrive tomorrow (and he won't be charged anything for it), and offering Ellison his choice of any floral arrangement or gift basket free on his wife's birthday.

EMAIL SKILLS

10-44. Message Strategies: Granting Claims [LO-4] Like many of the staff at Razer, you are an avid game player. You can therefore sympathize with Louis Hapsberg, a customer who got so excited during a hotly contested game that he slammed his Razer Anansi keyboard against his chair in celebration. Razer products are built for serious action, but no keyboard can withstand a blow like that. However, in the interest of building goodwill among the online gaming community, your manager has approved a free replacement. This sort of damage is rare enough that the company isn't worried about unleashing a flood of similar requests.

Your task: Respond to Hapsberg's email request for a replacement, in which he admitted to inflicting some abuse on this keyboard. Explain, tongue in cheek, that the company is "rewarding" him with a free keyboard in honor of his massive gaming win, but gently remind him that even the most robust electronic equipment needs to be used with care.

PODCASTING SKILLS/PORTFOLIO BUILDER

10-45. Message Strategies: Providing Routine Information; Media Skills: Podcasting [LO-4] As a training specialist in Winnebago Industry's human resources department, you're always on the lookout for new ways to help employees learn vital job skills. While watching a production worker page through a training manual as he was learning how to assemble a new recreational vehicle, you get what seems to be a great idea: Record the assembly instructions as audio files that workers can listen to while performing the necessary steps. With audio instructions, they wouldn't need to keep shifting their eyes between the product and the manual—and constantly losing their place. They could focus on the product and listen for each instruction. Plus, the new system wouldn't cost much at all; any computer can record the audio files, and you'd simply make them available on an intranet site for download into smartphones, tablets, and digital music players.

Your task: You immediately run your new idea past your boss, who has heard about podcasting but doesn't think it has any place in business. He asks you to prove the viability of the idea by recording a demonstration. Choose a process you engage in yourself—anything from replacing the strings on a guitar to sewing a quilt to changing the oil in a car—and write a brief (one page or less) description of the process that could be recorded as an audio file. Think carefully about the limitations of the audio format as a replacement for printed text. (For instance, do you need to tell people to pause the audio while they perform a time-consuming task?) If directed by your instructor, record your instructions as a podcast.

BLOGGING SKILLS

10-46. Message Strategies: Writing Instructions [LO-4] Today's smartphones have become multipurpose "life tools" that can offer a staggering array of capabilities. A potential downside of all this mobile power is complexity—with so many features and functions in their hands, phone users don't always know how to use all the tools or even how to find them. Imagine that you write a "tech blog for non-techies," where you post helpful advice on using popular products.

Your task: Review the steps for writing instructions on page 294 and then visit Samsung's website (**www.samsung.com**). Review the current selection of mobile phones or tablets, and choose one that intrigues you. Identify a feature or capability whose operation might not be immediately obvious to some owners. Possible examples include shooting slow-motion video, using a handwriting stylus as a remote control for the camera, or transferring photos to a memory card. Find an interactive product guide or user manual for the product on the Samsung website and locate the instructions for using that feature. Write a brief set of instructions for people who have never used a feature like this. For the purposes of this exercise, you can incorporate selected phrases from the Samsung website if they are the clearest and most obvious way to explain something, but make the overall piece of writing your own.

Routine Replies

EMAIL SKILLS

10-47. Message Strategies: Routine Responses [LO-4] As the administrative assistant to Walmart's director of marketing, you have just received a request from the company's webmaster to analyze Walmart's website from a consumer's point of view.

Your task: Visit **www.walmart.com** and browse through the site, considering the language, layout, graphics, and overall ease of use. In particular, look for aspects of the site that might be confusing or frustrating—annoyances that could prompt shoppers to abandon their quests and head to a competitor such as Target or Amazon. Summarize your findings and recommendations in an email message that could be sent to the webmaster.

MICROBLOGGING SKILLS

10-48. Message Strategies: Routine Announcements [LO-4] As a way to give back to the communities in which it does business, your company supports the efforts of the United Way, a global organization that works to improve lives through education, income stability, and healthy living choices.[6] Each year, your company runs a fundraising campaign in which employees are encouraged to donate money to their local United Way agencies, and it also grants employees up to three paid days off to volunteer their time for the United Way. This year, you are in charge of the company's campaign.

Your task: Compose a four-message sequence to be posted on the company's internal microblogging system (essentially a private version of Twitter). The messages are limited to 200 characters, including spaces and punctuation. The first message will announce the company's annual United Way volunteering and fundraising campaign (make up any details you need), and the other three messages will explain the United Way's efforts in the areas of education, income stability, and healthy living. Visit the United Way website (**www.unitedway.org**) to learn more about these three areas.

LETTER-WRITING SKILLS/TEAM SKILLS

10-49. Message Strategies: Providing Recommendations [LO-4] As a project manager at Expedia, one of the largest online travel services in the world, you've seen plenty of college interns in action. However, few have impressed you as much as Maxine "Max" Chenault. For one thing, she learned how to navigate the company's content management system virtually overnight and always used it properly, whereas other interns sometimes left things in a hopeless mess. She asked lots of intelligent questions about the business. You've been teaching her blogging and website design principles, and she's picked them up rapidly. Moreover, she is always on time, professional, and eager to assist. Also, she didn't mind doing mundane tasks.

On the downside, Chenault is a popular student. Early on, you often found her busy on the phone planning her many

social activities when you needed her help. After you had a brief talk with her, this problem vanished.

You'll be sorry to see Chenault leave when she returns to school in the fall, but you're pleased to respond when she asks you for a letter of recommendation. She's not sure where she'll apply for work after graduation or what career path she'll choose, so she asks you to keep the letter fairly general.

Your task: Working with a team of your classmates, discuss what should and should not be in the letter. Prepare an outline based on your discussion and then draft the letter.

Positive Messages

BLOGGING SKILLS

10-50. Message Strategies: Routine Announcements [LO-4] Scoop.it is one of the most popular platforms for content curation (see page 228). One of the ways a company can use Scoop.it is to find and present content of interest to its customers.

Your task: Choose any company that interests you and imagine that you are in charge of its public communication efforts. Write a post for the company's internal blog, announcing that the company is now on Scoop.it. Briefly describe Scoop.it and explain how it will help the company connect with its customers. Visit the Scoop.it website at **www.scoop.it** to learn more about the system.

BLOGGING SKILLS/TEAM SKILLS

10-51. Message Strategies: Instructions [LO-4] Innovations in communication can make life easier for employees and managers, but they often require learning new systems, new terminology, and sometimes new habits.

Your task: Visit the website of Slack, the popular workgroup messaging system, at **slack.com** and familiarize yourself with the capabilities of the system. Write a post for your class blog that introduces Slack, defines any key terms users need to know (such as *channels*), and lists the most important benefits of using the system for team and workplace communication. Supplement your research on the Slack website by reviewing other online sources as needed.

WEB-WRITING SKILLS

10-52. Message Strategies: Good-News Messages [LO-4] Amateur and professional golfers in search of lower scores want to find clubs that are optimized for their individual swings. This process of *club fitting* has gone decidedly high-tech in recent years, with fitters using Doppler radar, motion-capture video, and other tools to evaluate golfers' swing and ball flight characteristics. Hot Stix Golf is a leader in this industry, having fitted more than 200 professionals and thousands of amateurs.[7]

Your task: Imagine that you are the communications director at the Indian Wells Golf Resort in Indian Wells, California. Your operation has just signed a deal with Hot Stix to open a fitting center on site. Write a three-paragraph article that could be posted on the resort website. The first paragraph should announce the news that the Hot Stix center will open in six months, the second should summarize the benefits of club fitting, and the third should offer a brief overview of the services that will be available at the Indian Wells Hot Stix Center. Information on club fitting can be found on the Hot Stix website at **www.hotstixgolf.com**.

BLOGGING SKILLS/PORTFOLIO BUILDER

10-53. Message Strategies: Good-News Messages [LO-4] Most people have heard of the Emmy, Grammy, Oscar, and Tony Awards for television, music, movies, and theater performances, but fewer know what the Webby Awards are all about. Sponsored by the International Academy of Digital Arts and Sciences, the Webbys shine a spotlight on the best in website design, interactive media, and online film and video.[8]

Your task: Visit the Webby Awards website at **www.webbyawards.com**, select Winners, and choose one of the companies listed as a winner in the Websites or Advertising & Media categories. Now imagine you are the chief online strategist for this company, and you've just been informed your company has won a Webby. Winning this award is a nice validation of the work your team has put in during the past year, and you want to share their success with the entire company. Write a brief post for the internal company blog describing what the Webby Awards are, explaining why they are a significant measure of accomplishment in the online industry, and congratulating the employees in your department who contributed to the successful web effort.

SOCIAL NETWORKING SKILLS

10-54. Message Strategies: Goodwill Messages [LO-4] As the largest employer in Loganville, your construction company provides jobs, purchasing activity, and tax receipts that make up a vital part of the city's economy. In your role as CEO, however, you realize that the relationship between your company and the community is mutually beneficial, and the company could not survive without the efforts of its employees, the business opportunities offered by a growing marketplace, and the physical and legal infrastructure that the government provides.

The company's dependence on the community was demonstrated in a moving and immediate way last weekend, when a powerful storm pushed the Logan River past flood stage and threatened to inundate your company's office and warehouse facilities. More than 200 volunteers worked alongside your employees through the night to fill and stack sandbags to protect your buildings, and the city council authorized the deployment of heavy equipment and additional staff to help in the emergency effort. As you watched the water rise nearly 10 feet behind the makeshift dike, you realized that the community came together to save your company.

Your task: Write a 100- to 200-word post for your company's Facebook page, thanking the citizens and government officials of Loganville for their help in protecting the company's facilities during the storm.

SOCIAL NETWORKING SKILLS

10-55. Message Strategies: Goodwill Messages [LO-4] Every April, your company stages a competition for the sales department called Spring Surge, which awards sales representatives who bring in the most new revenue during the month. The awards are significant, including a first prize of a trip to Hawaii for the winning sales rep's entire family, and most people in the department take the competition seriously.

Here are the results of this year's competition:

- First place (trip for family to Hawaii): Juanita Hermosa
- Second place (luxury box seats at an NFL playoff game): Jackson Peabody
- Third place ($500 prepaid credit card): Duane Redd
- Total new revenue booked during April: $4.7 million

Your task: Write a brief post (150 to 200 words) for your company's internal social networking platform, incorporating these results and thanking everyone in the sales department for their efforts during the Spring Surge.

LETTER-WRITING SKILLS

10-56. Message Strategies: Goodwill Messages [LO-4] Shari Willison worked as a geologist in your civil engineering firm for 20 years before succumbing to leukemia last week. With only a few dozen employees, the company has always been a tight-knit group, and you feel like you've lost a good friend in addition to a valued employee.

Your task: Write a letter of condolence to Willison's husband, Arthur, and the couple's teenaged children, Jordan and Amy. You have known all three socially through a variety of company holiday parties and events over the years.

LETTER-WRITING SKILLS

10-57. Message Strategies: Goodwill Messages [LO-4] The office was somber this morning when you arrived at work, as employees learned that Michael, the partner of the chief operating officer, Leo West, had been killed in a car accident over the weekend. You never met Michael, and West is two levels above you in the corporate hierarchy (you're a first-level supervisor), so you don't have a close working relationship. However, you have been on comfortable terms with West during the 10 years you've been at this company, and although you've never socialized with him outside of work, you've both occasionally shared personal and social news during casual conversations in the cafeteria.

Your task: Write a letter of condolence to West.

Endnotes

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11 Writing Negative Messages

LEARNING OBJECTIVES

After studying this chapter, you will be able to

1. Apply the three-step writing process to negative messages.
2. Explain how to use the direct approach effectively when conveying negative news.
3. Explain how to use the indirect approach effectively when conveying negative news.
4. Explain the importance of maintaining high standards of ethics and etiquette when delivering negative messages.
5. Describe successful strategies for sending negative messages on routine business matters.
6. List the important points to consider when conveying negative organizational news.
7. Describe successful strategies for sending negative employment-related messages.



Kim White/Bloomberg/Getty Images

After a widespread scandal, Wells Fargo faced the daunting task of rebuilding its reputation in the eyes of consumers and government regulators.

COMMUNICATION CLOSE-UP AT
Wells Fargo

www.wellsfargo.com

Companies find themselves apologizing for a variety of reasons, from late deliveries to faulty products to industrial accidents. Most of the time, firms can quickly move on from a mistake and rebuild stakeholder trust by apologizing sincerely and addressing the causes of the error. The San Francisco-based banking giant Wells Fargo, however, has been embroiled in a multiyear scandal that led to one of the most comprehensive "apology campaigns" in the history of U.S. business.

Under management pressure to meet unrealistic sales targets, employees at Wells Fargo signed up customers for new bank accounts, credit cards, and insurance policies without customers' knowledge. The fraud was massive by any measure: Thousands of employees were involved over the course of many years, and they set up more than 3 million phony accounts and charged more than a half-million customers for unnecessary car insurance. Customers wound up paying fees on accounts opened in their names that they didn't know about, and many suffered significant financial damage, including thousands who had their cars repossessed.

Some employees had been reporting the phony accounts scandal to their supervisors for years. The bank not only didn't act on the reports but in some cases allegedly fired employees who raised concerns. When the fraud finally came to light, more than 5,000 employees and several top executives were fired, some members of the board of directors were replaced, the bank was fined hundreds of millions of dollars, and it is still subject to ongoing lawsuits and regulatory restrictions.

When a company is caught in a scandal of this magnitude, how should it respond? Clearly, more than just a simple apology was called for. The executives who took over in the aftermath admitted the bank needed to make some fundamental changes in its culture, organization, and policies to prevent this sort of behavior from recurring. Those changes were outlined in a comprehensive, 104-page report that explained what went wrong, why it went wrong, and what the company was doing to make things right. The report opened with the following statement:

> Wells Fargo has a long history of serving customers through trusted relationships and products and services that help customers succeed financially. We clearly broke that trust through unacceptable sales practices in our Community Bank and issues in other businesses. Our actions resulted in customer harm and caused significant damage to our reputation. We are sorry and are working hard to make things right.

This paragraph demonstrates several points about effective corporate apologies: unambiguously accepting responsibility, apologizing for the harm caused, and promising to do better. These are all positive aspects that show the "you" attitude in action. Moreover, the report later goes into detail about the specific changes being made, rather than leaving the reader with nothing but vague promises.

On the other hand, critics could point out that there is a little too much "me" in the statement as well, in the opening line about the bank's history and later in the paragraph, where it mentions how the scandal harmed the bank's reputation. Customers who lost their cars or had their credit ratings damaged probably aren't too concerned with the bank's glorious history or the reputational problems it caused for itself.

This situation presents a tough question of balance and timing. The bank clearly needs to rebuild its reputation, and its long history is an important asset in that effort. Sustained ethical performance will ultimately determine how well and how quickly Wells Fargo can rehabilitate itself in the public eye, but communication will play a major role in reassuring consumers and regulators that the bank really has changed.[1]

Using the Three-Step Writing Process for Negative Messages

1 LEARNING OBJECTIVE
Apply the three-step writing process to negative messages.

Chances are good you will never need to apologize for a major banking scandal (see the chapter-opening Communication Close-Up), but you will need to share unwelcome news at many points in your career. Communicating negative information is a fact of life for all business professionals, whether it's saying no to a request, sharing unpleasant or unwelcome information, or issuing a public apology. With the techniques you'll learn in this chapter, however, you can communicate unwelcome news successfully while minimizing unnecessary stress for everyone involved.

Negative news messages need to accomplish as many as five distinct goals, so they require careful planning and sensitive writing.

Depending on the situation, you can have as many as five goals when communicating negative information:

- To convey the bad news
- To gain acceptance of the bad news
- To preserve as much of your audience's goodwill as possible
- To maintain (or repair) your reputation or your organization's reputation
- To reduce or eliminate the need for future correspondence on the matter

This is a lot to accomplish in one message, so careful planning and execution are particularly critical with negative messages.

STEP 1: PLANNING A NEGATIVE MESSAGE

Start with a clear purpose and your audience's needs in mind.

To minimize further damage to business relationships and to encourage the acceptance of your message, start with a clear purpose and your audience's needs in mind. Think about the information your audience will need to understand and accept your message. Negative messages can be intensely personal to recipients, who often have a right to expect a thorough explanation of your answer.

Choose the medium and channel with care when preparing negative messages; some negative messages are best conveyed in person.

Selecting the best combination of medium and channel is critical. If you're delivering bad news to employees, for instance, sharing it in person shows respect for them and gives them an opportunity to ask questions. Handling the situation live and in person can be uncomfortable, to be sure, but doing so is often the best way to clear the air and prevent the spread of rumors. In-person conversation isn't always possible, however, and many negative messages will need to be delivered via print or digital channels.

With the *direct approach*, you open with the main idea and then explain it as needed.

With the *indirect approach*, you lay out an explanation or background information first and then present the main idea.

The organization of a negative message requires special attention, starting with whether to use the direct or indirect approach (see Figure 11.1). A negative message using the *direct approach* opens with the bad news, proceeds to the reasons for the situation or decision, offers any additional information that may help the audience, and ends with a respectful statement aimed at maintaining a good relationship with the audience. In contrast, the *indirect approach* opens with a *buffer* (see page 312) and then builds up the reasons behind the bad news before presenting the bad news itself.

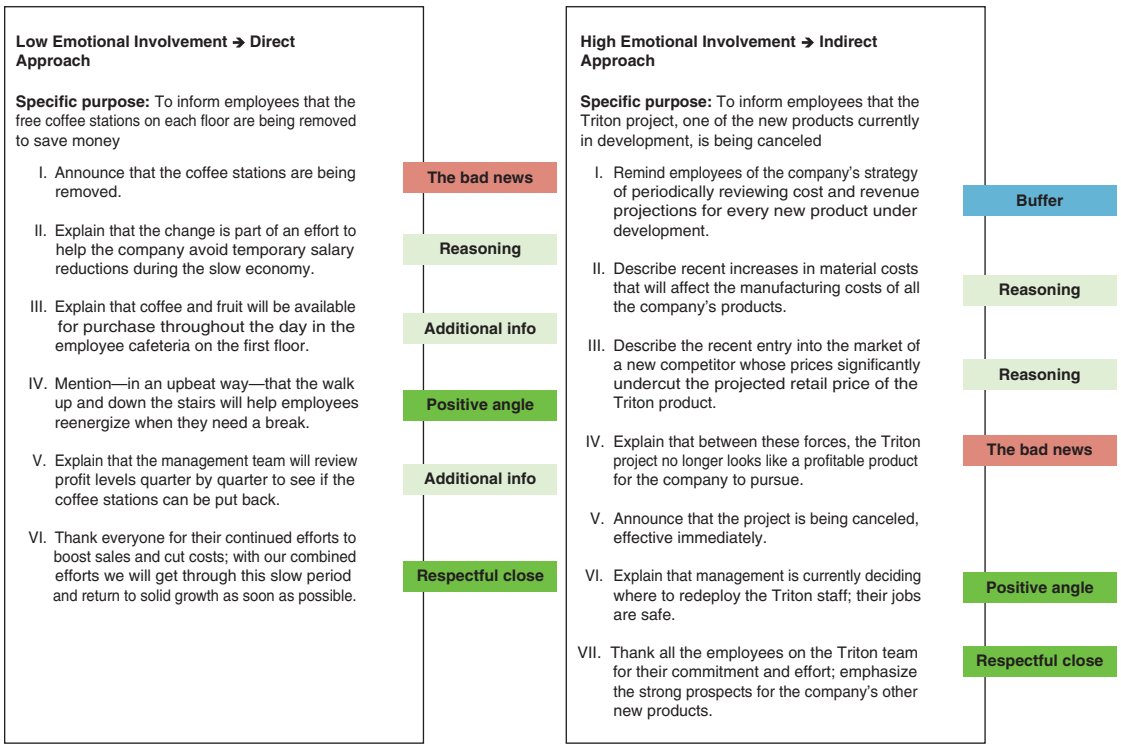


Figure 11.1 Comparing the Direct and Indirect Approaches for Negative Messages
The direct and indirect approaches differ in two important ways: the position of the bad news within the sequence of message points and the use of a *buffer* in the indirect approach. ("Using the Indirect Approach for Negative Messages" on page 312 explains the use of a buffer.) Both these messages deal with changes made in response to negative financial developments, but the second example represents a much higher emotional impact for readers, so the indirect approach is called for in that case. Figure 11.2 on the next page explains how to choose the right approach for each situation.

To help decide which approach to take in any situation, ask yourself the following questions:

Check out the "Five-Minute Guide to Writing Negative Messages" at the end of the chapter.

- **Do you need to get the reader's attention immediately?** If the situation is an emergency or if someone has ignored repeated messages, the direct approach can help you get attention quickly.
- **Does the recipient prefer a direct style of communication?** Some recipients prefer the direct approach no matter what, so if you know this to be the case, go with direct.
- **How important is this news to the reader?** For minor or routine situations, the direct approach is nearly always best. However, if the reader has an emotional investment in the situation or if the consequences to the reader are considerable, the indirect approach is often better, particularly if the bad news is unexpected.
- **Will the bad news come as a shock?** The direct approach is fine for many business situations in which people understand the possibility of receiving bad news. However, if the bad news might come as a shock to readers, use the indirect approach to help them prepare for it.

Figure 11.2 on the next page offers a convenient decision tree to help you decide which approach to use.

STEP 2: WRITING NEGATIVE MESSAGES

By writing clearly and sensitively, you can take some of the sting out of bad news and help your reader accept the decision and move on. If your credibility hasn't already been established with an audience, clarify your qualifications so recipients won't question your authority or ability.

Choose your language carefully; you can deliver negative news without being negative.

When you use language that conveys respect and avoids an accusing tone, you protect your audience's pride. This kind of communication etiquette is always important,

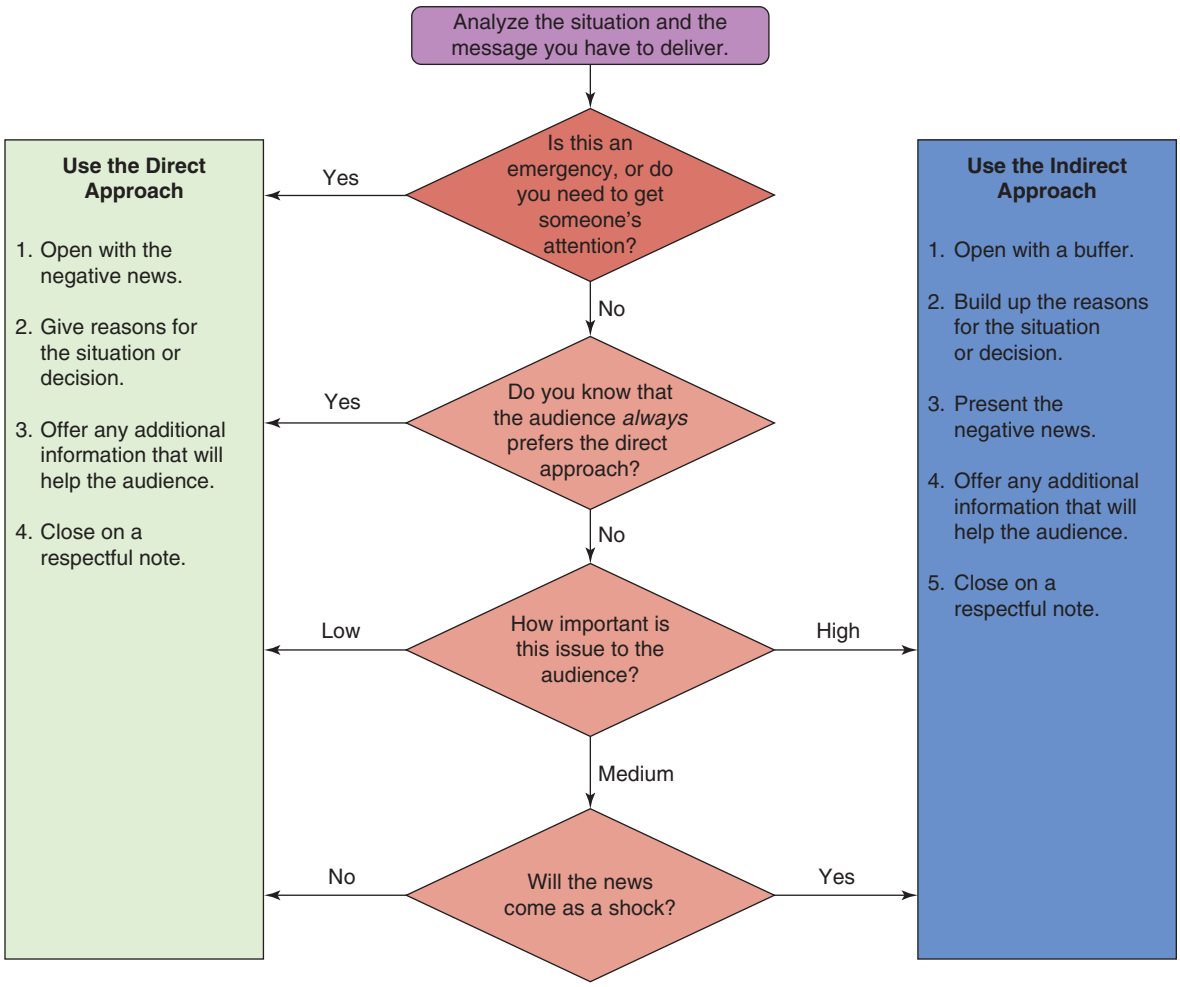


Figure 11.2 Choosing the Direct or Indirect Approach
Following this decision tree will help you decide whether the direct or indirect approach is better in a given situation. Of course, use your best judgment as well. Your relationship with the audience could affect your choice of approaches, for example.

but it demands special care with negative messages. Moreover, you can ease the sense of disappointment by using positive words rather than negative, counterproductive ones (see Table 11.1).

STEP 3: COMPLETING NEGATIVE MESSAGES

Even small flaws in a message are likely to be magnified in readers' minds as they react to the negative news because these errors can create the impression that you are careless or incompetent. Revise your content to make sure everything is clear, complete,

TABLE 11.1 Choosing Positive Words

Examples of Negative Phrasings	Positive Alternatives
Your request *doesn't make any sense.*	Please clarify your request.
The *damage won't be fixed* for a week.	The item will be repaired next week.
Although it wasn't *our fault*, there will be an *unavoidable delay* in your order.	We will process your order as soon as we receive an aluminum shipment from our supplier, which we expect within 10 days.
You are clearly *dissatisfied*.	I recognize that the product did not live up to your expectations.
I was *shocked* to learn that you're *unhappy*.	Thank you for sharing your concerns about your shopping experience.
The enclosed statement is *wrong*.	Please verify the enclosed statement and provide a correct copy.

and concise. Produce clean, professional-looking digital messages or printed documents, and proofread carefully to eliminate mistakes. Finally, be sure to deliver messages promptly. Withholding or delaying bad news can be unethical—even illegal, in some cases.

Using the Direct Approach for Negative Messages

2 LEARNING OBJECTIVE
Explain how to use the direct approach effectively when conveying negative news.

A negative message using the direct approach opens with the bad news, proceeds to the reasons for the situation or decision, and ends with a positive statement aimed at maintaining a good relationship with the audience. Depending on the circumstances, the message may also offer alternatives or a plan of action to fix the situation under discussion. Stating the bad news at the beginning can have two advantages: (1) It makes a shorter message possible, and (2) it allows the audience to reach the main idea of the message in less time.

OPEN WITH A CLEAR STATEMENT OF THE BAD NEWS

If you've chosen the direct approach to convey bad news, use the introductory paragraph of your message to share that information. As Chapter 10 notes regarding routine negative replies, you can open with a few words that are the equivalent of in-person "socializing" before moving to the negative news. If necessary, remind the reader why you're writing.

PROVIDE REASONS AND ADDITIONAL INFORMATION

The amount of detail you provide in a negative message depends in part on your relationship with the audience.

In most cases, follow the direct opening with an explanation of how the negative situation came to be or whatever information your readers need to grasp and accept the main idea. The extent of your explanation depends on the nature of the news and your relationship with the reader. For example, if you want to preserve a long-standing relationship with an important customer, a detailed explanation could well be worth the extra effort such a message would require.

However, you will encounter some situations in which explaining negative news is neither appropriate nor helpful, such as when the reasons are confidential, excessively complicated, or irrelevant to the reader.

Should you apologize when delivering bad news or responding to negative situations? The answer isn't quite as simple as one might think, partly because the notion of *apology* is hard to pin down. To some people, it simply means an expression of sympathy that something negative has happened to another person. To others, it can mean admitting fault and, if appropriate, taking responsibility for specific compensations or corrections to atone for the mistake.

Some experts have advised that a company should never apologize, even when it knows it has made a mistake, because the apology might be taken as a confession of guilt that could be used against the company in a lawsuit. However, several states have laws that specifically prevent expressions of sympathy from being used as evidence of legal liability. In fact, judges, juries, and plaintiffs tend to be more forgiving of companies that express sympathy for wronged parties. Moreover, a sincere, effective apology can help repair—and even improve—a company's reputation.[2]

Creating an effective apology involves four key decisions:[3]

An effective apology involves four key decisions:
- It should be delivered by someone whose position in the organization matches the gravity of the situation.
- It must be a real apology; don't say "I'm sorry *if* anyone was offended . . ."
- It must be delivered quickly.
- Media and channel choices are crucial.

- First, the apology should be delivered by someone whose position in the organization corresponds with the gravity of the situation. The CEO doesn't need to apologize for a late package delivery, but he or she does need to be the public face of the company when a major problem occurs, as in the case of the Wells Fargo scandal.

- Second, the apology needs to be real. Saying "I'm sorry if anyone was offended" isn't an apology at all. The conditional *if* implies that you're not sorry at all and that it's the other party's fault for being offended.[4]
- Third, apologies need to be delivered quickly. A fast response makes the message more meaningful to the affected parties, and it helps the company maintain some control over the story, rather than reacting to social media outrage.
- Fourth, media and channel choices are crucial. The right choice can range from a private conversation to a written message posted online to a public press conference, depending on the situation.

Recognize that you can express sympathy with someone's plight without suggesting that you are to blame. For example, if a customer damaged a product through misuse, you can say something along the lines of "I'm sorry to hear of your difficulties." This demonstrates sensitivity without accepting blame.

CLOSE ON A RESPECTFUL NOTE

Close your message on a respectful note, being as positive as you can be without being insincere.

After you have explained the negative news, close the message in a manner that respects the impact the news is likely to have on the recipient. If it's possible and appropriate, offer your readers an alternative solution, but only if doing so is a smart use of your time. Look for opportunities to include positive statements, but avoid creating false hopes or writing in a way that seems to suggest that something negative didn't happen. Ending on a false positive can leave readers feeling "disrespected, disregarded, or deceived."[5]

Using the Indirect Approach for Negative Messages

3 LEARNING OBJECTIVE
Explain how to use the indirect approach effectively when conveying negative news.

Use the indirect approach when some preliminary discussion will help your audience accept the unwelcome news.

The indirect approach helps readers prepare for the bad news by outlining the reasons for the situation before presenting the bad news itself. This approach is not meant to obscure bad news, delay it, or limit your responsibility. Its purpose is to ease the blow and help readers accept the news. When done poorly, the indirect approach can be disrespectful and even unethical. But when done well, it is a good example of audience-oriented communication crafted with attention to both ethics and etiquette. Showing consideration for the feelings of others is never dishonest.

OPEN WITH A BUFFER

A buffer gives you the opportunity to start the communication process without jumping immediately into the bad news.

Messages using the indirect approach open with a **buffer**, which is a neutral, noncontroversial statement that is closely related to the point of the message but doesn't convey the bad news. The purposes of a buffer are to ease the reader into the message by establishing common ground and to create space for a transition into the reasoning and evidence that you are going to lay out next.

Depending on the circumstances, a good buffer can express your appreciation for being considered, assure the reader of your attention to the request, indicate your understanding of the reader's needs, introduce the general subject matter, or simply establish common ground with your reader. A good buffer also needs to be relevant and sincere. In contrast, a poorly written buffer might trivialize the reader's concerns, divert attention from the problem with insincere flattery or irrelevant material, or mislead the reader into thinking your message actually contains good news.

Poorly written buffers mislead or insult the reader.

Consider these possible responses to a manager of the order-fulfillment department who requested some temporary staffing help from your department (a request you won't be able to fulfill):

TABLE 11.2 Types of Buffers

Buffer Type	Strategy	Example
Agreement	Find a point on which you and the reader share similar views.	We both know how hard it is to make a profit in this industry.
Appreciation	Express sincere thanks for receiving something.	Your check for $127.17 arrived yesterday. Thank you.
Cooperation	Convey your willingness to help in any way you realistically can.	Employee Services is here to assist all associates with their health insurance, retirement planning, and continuing education needs.
Fairness	Assure the reader that you've closely examined and carefully considered the problem, or mention an appropriate action that has already been taken.	For the past week, we have had our bandwidth monitoring tools running around the clock to track your upload and download speeds.
Good news	Start with the part of your message that is favorable.	We have credited your account in the amount of $14.95 to cover the cost of return shipping.
Praise	Find an attribute or an achievement to compliment—but don't create false hope that a positive message will follow.	The Stratford Group clearly has an impressive record of accomplishment in helping clients resolve financial reporting problems.
Resale	Favorably discuss the product or company related to the subject of the letter.	With their heavy-duty, full-suspension hardware and fine veneers, the desks and file cabinets in our Montclair line have long been popular with value-conscious professionals.
Understanding	Demonstrate that you understand the reader's goals and needs.	So that you can more easily find the printer with the features you need, we are enclosing a brochure that describes all the Epson printers currently available.

Our department shares your goal of processing orders quickly and efficiently.
← Establishes common ground with the reader and validates the concerns that prompted the original request—without promising a positive answer

As a result of the last downsizing, every department in the company is running shorthanded.
← Establishes common ground but in a negative way that downplays the recipient's concerns

You folks are doing a great job over there, and I'd love to be able to help out.
← Potentially misleads the reader into concluding that you will comply with the request

Those new state labor regulations are driving me crazy over here; how about in your department?
← Trivializes the reader's concerns by opening with an irrelevant issue

Only the first of these buffers can be considered effective. The others are likely to damage your relationship with the other manager. Table 11.2 provides several types of effective buffers you can use to open a negative message tactfully.

PROVIDE REASONS AND ADDITIONAL INFORMATION

Build your reasoning in a way that signals the negative news ahead.

An effective buffer serves as a transition to the next part of the message, in which you build up the explanations and information that will culminate in the negative news. An ideal explanation section leads readers to the conclusion before you come right out and say it. The reader has followed your line of reasoning and is ready for the answer. By laying out your reasons first, you help maintain focus on the issues at hand and defuse the emotions that accompany significantly bad news. An effective approach is to start with positive or neutral points and move through progressively negative points. Provide enough detail for the audience to understand your reasons, but be concise.

Whenever possible, don't use the blanket phrase "company policy" as the reason for the bad news.

As much as possible, avoid hiding behind company policy to cushion your bad news. If you say, "Company policy forbids our hiring anyone who does not have two years' supervisory experience," you imply that you won't consider anyone on his or her individual merits. By sharing the reasons behind the policy (if appropriate in the circumstances), you can give readers a more satisfying answer. Consider this response to an applicant:

Because these management positions are quite challenging, the human relations department has researched the qualifications needed to succeed in them. The findings show that the two most important qualifications are a bachelor's degree in business administration and two years' supervisory experience.

← Shows the reader that the decision is based on a methodical analysis of the company's needs and not on some arbitrary guideline

← Establishes the criteria behind the decision and lets the reader know what to expect

This paragraph does a good job of stating reasons for the refusal:

- It provides enough detail to logically support the refusal.
- It implies that the applicant is better off avoiding a position in which he or she might fail.
- It doesn't apologize for the decision because no one is at fault.
- It avoids negative personal statements (such as "You do not meet our requirements").

If you've done a good job of laying out your reasoning, you've done everything you can to prepare the reader for the negative news.

Even valid, well-thought-out reasons won't convince every reader in every situation, but if you've done a good job of laying out your reasoning, then you've done everything you can to prepare the reader for the main idea, which is the negative news itself.

CONTINUE WITH A CLEAR STATEMENT OF THE BAD NEWS

To convey bad news sensitively,
- Express it clearly, but don't repeat it or belabor it
- Use a conditional statement if appropriate
- Tell what you can or did do, not what you can't or didn't do

After you've thoughtfully and logically established your reasons and readers are prepared to receive the bad news, you can use three techniques to convey the negative information as clearly and as kindly as possible. First, make sure you don't overemphasize the bad news:

- Minimize the space or time devoted to the bad news without trivializing it. Don't withhold important information, but don't repeat or belabor the bad news.
- Subordinate bad news within a complex or compound sentence ("My department is already shorthanded, so I'll need all my staff for at least the next two months").
- Embed bad news in the middle of a paragraph or use parenthetical expressions ("Our profits, which are down, are only part of the picture").

Keep in mind, however, that it's possible to abuse this notion of deemphasizing bad news. For instance, if the primary point of your message is that profits are down, it would be inappropriate to marginalize that news by burying it in the middle of a sentence. State the negative news clearly, and then make a smooth transition to any positive news that might balance the story.

Second, if appropriate, use a conditional (*if* or *when*) statement to imply that the audience could have received, or might someday receive, a favorable answer under different circumstances ("When you have more managerial experience, you are welcome to apply for any openings that we may have in the future"). Such a statement could motivate applicants to improve their qualifications. If you use a conditional, though, you must avoid any suggestion that you might reverse the decision you've just made or any phrasing that could give a rejected applicant false hope.

When you express the unwelcome news, look for ways to emphasize what you can do or have done rather than what you cannot do.

Third, emphasize what you can do or have done rather than what you cannot do. Also, by implying the bad news, you may not need to actually state it, thereby making the bad news less personal ("Our development budget for next year is fully committed to our existing slate of projects"). Just make sure your audience understands the entire message—including the bad news. If an implied message might lead to uncertainty, state your decision in direct terms. Just be sure to avoid overly blunt statements that are likely to cause offense:

Instead of This	Write This
I *must refuse* your request.	I will be out of town on the day you need me.
We *must deny* your application.	The position has been filled.
We *cannot afford to* continue the program.	The program will conclude on May 1.
Much as I would like to attend ...	Our budget meeting ends too late for me to attend.
We *must turn down* your extension request.	Please send in your payment by June 14.

CLOSE ON A RESPECTFUL NOTE

Don't disguise the bad news when you emphasize the positive.

As with the direct approach, the close in the indirect approach offers an opportunity to emphasize your respect for your audience, even though you've just delivered unpleasant news. Express best wishes without ending on a falsely upbeat note. If you can find a positive angle that's meaningful to your audience, by all means consider adding it to your conclusion. However, don't try to pretend that the negative news didn't happen or that it won't affect the reader. Suggest alternative solutions if such information is available and doing so is a good use of your time. If you've asked readers to decide between alternatives or to take some action, make sure that they know what to do, when to do it, and how to do it. Whatever type of conclusion you use, follow these guidelines:

A respectful close
- Avoids an uncertain conclusion
- Manages expectations about future correspondence
- Expresses optimism, if appropriate
- Is sincere

- **Avoid an uncertain conclusion.** If the situation or decision is final, avoid statements such as "I trust our decision is satisfactory," which imply that the matter is open to discussion or negotiation.
- **Manage expectations about future correspondence.** Encourage additional communication *only* if you're willing to discuss your decision further. If you're not, avoid wording such as "If you have further questions, please write."
- **Express optimism, if appropriate.** If the situation might improve in the future, share that with your readers if it's relevant. However, don't suggest the possibility of a positive change if you don't have insight that it might happen.
- **Be sincere.** Avoid clichés that are insincere in view of the bad news. If you can't help, don't say, "If we can be of any help, please contact us."

Keep in mind that the close can have a lasting impact on your audience. Even though they're disappointed, leave them with the impression that they were treated with respect. For a quick reminder on creating effective negative messages, see "Checklist: Creating Negative Messages."

CHECKLIST ✓ Creating Negative Messages

A. Choose the direct or indirect approach.
- Consider using the direct approach when the audience is aware of the possibility of negative news, when the reader is not emotionally involved in the message, when you know that the reader would prefer the bad news first, when you know that firmness is necessary, or when you want to discourage a response.
- Consider using the indirect approach when the news is likely to come as a shock or surprise, when your audience has a high emotional investment in the outcome, or when you want to maintain a good relationship with the audience.

B. For the indirect approach, open with an effective buffer.
- Establish common ground with the audience.
- Validate the request, if you are responding to a request.
- Don't trivialize the reader's concerns.
- Don't mislead the reader into thinking the coming news might be positive.

C. Provide reasons and additional information.
- Explain why the news is negative.
- Adjust the amount of detail to fit the situation and the audience.
- Avoid explanations when the reasons are confidential, excessively complicated, or irrelevant to the reader.
- If appropriate, state how you plan to correct or respond to the negative news.
- Seek the advice of company lawyers if you're unsure what to say.

D. Clearly state the bad news.
- State the bad news as positively as possible, using tactful wording.
- To help protect readers' feelings, deemphasize the bad news by minimizing the space devoted to it, subordinating it, or embedding it.
- If your response might change in the future if circumstances change, explain the conditions to the reader.
- Emphasize what you can do or have done rather than what you can't or won't do.

E. Close on a respectful note.
- Express best wishes without being falsely positive.
- Suggest actions readers might take, if appropriate, and provide them with necessary information.
- Encourage further communication only if you're willing to discuss the situation further.

Maintaining High Standards of Ethics and Etiquette

4 LEARNING OBJECTIVE
Explain the importance of maintaining high standards of ethics and etiquette when delivering negative messages.

Negative messages require special care, for three reasons:
- Some negative-news situations are governed by laws and regulations.
- They can have a significant impact on the lives of those receiving them.
- Emotions often run high when negative messages are involved.

When you must share negative information, resist any temptation to delay or distort the message.

All business messages demand attention to ethics and etiquette, of course, but these considerations take on special importance when you are delivering bad news—for several reasons. First, a variety of laws and regulations dictate the content and delivery of some business messages with potentially negative content, such as the release of financial information by a public company. Second, negative messages can have a significant impact on the lives of those receiving them. Third, emotions often run high when negative messages are involved, for both the sender and the receiver. Senders need to manage their own emotions and consider the emotional state of their audiences.

For example, in a message announcing or discussing workforce cutbacks, you have the emotional needs of several stakeholder groups to consider. The employees who are losing their jobs are likely to experience fear about their futures and possibly a sense of betrayal. The employees who are keeping their jobs are likely to feel anxiety about the long-term security of their jobs, the ability of company management to turn things around, and the level of care and respect the company has for its employees. These "survivors" may also feel guilty about keeping their jobs while some colleagues lost theirs. Outside the company, investors, suppliers, and segments of the community affected by the layoffs (such as retailers and homebuilders) will have varying degrees of financial interest in the outcome of the decision. Writing such messages requires careful attention to all these needs while balancing respect for the departing employees with a positive outlook on the future.

When you must share negative information, resist any temptation to delay or distort the message (see "Ethics Detective: Solving the Case of the Deceptive Soft Sell"). Doing so may be unethical and even illegal. In recent years, numerous companies have been sued by shareholders, consumers, employees, and government regulators for allegedly withholding or delaying negative information in such areas as company finances, environmental hazards, and product safety. In many of these cases, the problem was slow, incomplete, or inaccurate communication between the company and external stakeholders. In others, problems stemmed from a reluctance to send or receive negative news within the organization.

ETHICS DETECTIVE

Solving the Case of the Deceptive Soft Sell

You and your colleagues are nervous. Sales have been declining for months, and you see evidence of budget tightening all over the place—the fruit and pastries have disappeared from the coffee stations, accountants are going over expense reports with magnifying glasses, and managers are slow to replace people who leave the company. The workgroup messaging system is abuzz with chatter; everyone wants to know if anyone has heard anything about layoffs.

The job market in your area is weak, and you know you might have to sell your house—in one of the weakest housing markets in memory—and move your family out of state to find another position in your field. If your job is eliminated, you're ready to cope with the loss, but you need as much time as possible. You breathe a sigh of relief when the following item from the CEO appears on the company's internal blog:

> With news of workforce adjustments elsewhere in our industry, we realize many of you are concerned about the possibility here. I'd like to reassure all of you that we remain confident in the company's fundamental business strategy, and the executive team is examining all facets of company operations to ensure our continued financial strength.

The message calms your fears. Should it?

A month later, the CEO announces a layoff of 20 percent of the company's workforce—nearly 700 people.

ANALYSIS

1. You're shocked by the news because you felt reassured by the blog posting from last month. In light of what happened, you retrieve a copy of the newsletter and reread the CEO's message. Does it seem ethical now? Why or why not? If you had been in charge of writing this newsletter item and your hands were tied because you couldn't come out and announce the layoffs yet, how would you have rewritten the message?

Effectively sharing bad news within an organization requires commitment from everyone involved. Employees must commit to sending negative messages when necessary and to do so in a timely fashion, even when that is unpleasant or difficult. Conversely, managers must commit to maintaining open communication channels, truly listening when employees have negative information to share, and not punishing employees who deliver bad news.

Ethically managed companies give employees and other parties safe and confidential ways to share questions and concerns with management. These channels can range from informal meetings with a supervisor to *ethics hotlines* that employees can call to report concerns. Reporting unethical or illegal behavior is known as **whistle-blowing**, and smart companies make sure employees have a way to express concerns internally so issues can be brought to management's attention and resolved quickly. Otherwise, employees may be forced to take their concerns public through government regulators or the news media. For internal feedback mechanisms to work, however, employees need to know their concerns will be addressed and that they won't suffer retaliation for blowing the whistle.

Whistle-blowing is expressing concerns either internally through company ethics hotlines or externally if a company refuses to respond to stated concerns.

Sending Negative Messages on Routine Business Matters

5 LEARNING OBJECTIVE
Describe successful strategies for sending negative messages on routine business matters.

Professionals and companies receive a wide variety of requests and cannot respond positively to every single one. In addition, mistakes and unforeseen circumstances can lead to delays and other minor problems that occur in the course of business. Whatever the purpose, crafting routine negative responses and messages quickly and graciously is an important skill for every businessperson.

Consider the following points whenever you write routine negative messages:

- Manage your time carefully; focus on the most important relationships and requests.
- If the matter is closed, don't imply that it's still open by using phrases such as "Let me think about it and get back to you" as a way to delay saying no.
- Offer alternative ideas if you can, particularly if the relationship is important.
- Don't imply that other assistance or information might be available if it isn't.

If you aren't prepared to offer additional information or assistance, don't imply that you are.

MAKING NEGATIVE ANNOUNCEMENTS ON ROUTINE BUSINESS MATTERS

On occasion managers need to make unexpected negative announcements. Because the news is unexpected, the indirect approach is usually the better choice. Follow the steps outlined for indirect messages: Open with a buffer that establishes some mutual ground between you and the reader, advance your reasoning, announce the change, and close with as much positive information and sentiment as appropriate under the circumstances.

For unexpected negative messages on routine matters, the indirect approach is usually more appropriate.

REJECTING SUGGESTIONS AND PROPOSALS

Managers receive a variety of suggestions and proposals, both solicited and unsolicited, from internal and external sources. For an unsolicited proposal from an external source, you may not need to respond if you don't already have a working relationship with the sender. If you need to reject a proposal you solicited, however, you owe the sender an explanation, and because the news may be unexpected, the indirect approach is better. In general, the closer your working relationship, the more thoughtful and complete you need to be in your response. For example, if you are rejecting a proposal from an employee, explain your reasons fully and carefully so that the employee can understand why the proposal was not accepted and so that you don't damage an important working relationship.

Rejecting suggestions and proposals, particularly if you asked for input, requires special care and tact to maintain a positive working relationship.

1 Plan →

Analyze the Situation
Verify that the purpose is to decline a request and offer alternatives; audience is likely to be surprised by the refusal.

Gather Information
Determine audience needs and obtain the necessary information.

Choose Medium and Channel
For formal messages, printed letters on company letterhead are best.

Organize the Information
The main idea is to refuse the request, so limit your scope to that; select the indirect approach based on the audience and the situation.

2 Write →

Adapt to Your Audience
Adjust the level of formality based on your degree of familiarity with the audience; maintain a positive relationship by using the "you" attitude, politeness, positive emphasis, and bias-free language.

Compose the Message
Use a conversational but professional style and keep the message brief, clear, and as helpful as possible.

3 Complete

Revise the Message
Evaluate content and review readability to make sure the negative information won't be misinterpreted; make sure your tone stays positive without being artificial.

Produce the Message
Maintain a clean, professional appearance on company letterhead.

Proofread the Message
Review for errors in layout, spelling, and mechanics.

Distribute the Message
Deliver your message using the chosen medium.



InfoTech

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March 5, 2021

Dr. Sandra Wofford, President
Whittier Community College
333 Whittier Avenue
Tulsa, OK 74150

Dear Dr. Wofford:

Infotech has been happy to support Whittier Community College in many ways over the years, and we appreciate the opportunities you and your organization provide to so many deserving students. Thank you for considering our grounds for your graduation ceremony on June 3.

We would certainly like to accommodate Whittier as we have in years past, but our companywide sales meetings will be held this year during the weeks of May 29 and June 5. With more than 200 sales representatives and their families from around the world joining us, activities will be taking place throughout our facility.

My assistant, Robert Seagers, suggests you contact the Municipal Botanical Gardens as a possible graduation site. He recommends calling Jerry Kane, director of public relations.

We remain firm in our commitment to you, President Wofford, and to the fine students you represent. Through our internship program, academic research grants, and other initiatives, we will continue to be a strong corporate partner to Whittier College and will support your efforts as you move forward.

Sincerely,

May Yee Kwan

May Yee Kwan
Public Relations Director

Figure 11.3 Effective Letter Declining a Routine Request
In declining a request to use her company's facilities, May Yee Kwan took note of the fact that her company has a long-standing relationship with the college and wants to maintain that positive relationship. Because the news is unexpected based on the receiver's experience with the company, she chose the indirect approach to build up to her announcement.

REFUSING ROUTINE REQUESTS

When you are unable to meet a routine request, your primary communication challenge is to give a clear negative response without generating negative feelings or damaging either your personal reputation or the company's. The direct approach works best for most routine negative responses because it is simpler and more efficient. The indirect approach works best when the stakes are high for you or for the receiver, when you or your company has an established relationship with the person making the request, or when you're forced to decline a request that you might have accepted in the past (see Figure 11.3 on page 318).

When turning down an invitation or a request for a favor, consider your relationship with the reader.

HANDLING BAD NEWS ABOUT TRANSACTIONS

Bad news about transactions is always unwelcome and usually unexpected. The preferred approach and the specific content and tone of each message can vary widely depending on the nature of the transaction and your relationship with the customer. Telling an individual consumer that his new sweater will be arriving a week later than you promised is a much simpler task than telling Toyota that 30,000 transmission parts will be a week late.

Some negative messages regarding transactions carry significant business ramifications.

The right approach to bad news about business transactions depends on the customer's expectations.

If you haven't done anything specific to set the customer's expectations—such as promising delivery within 24 hours—the message simply needs to inform the customer of the situation with little or no emphasis on apologies (see Figure 11.4).

If you did set the customer's expectations and now find that you can't meet them, your task is more complicated. In addition to resetting those expectations and explaining how you'll resolve the problem, you may need to include an element of apology. The scope

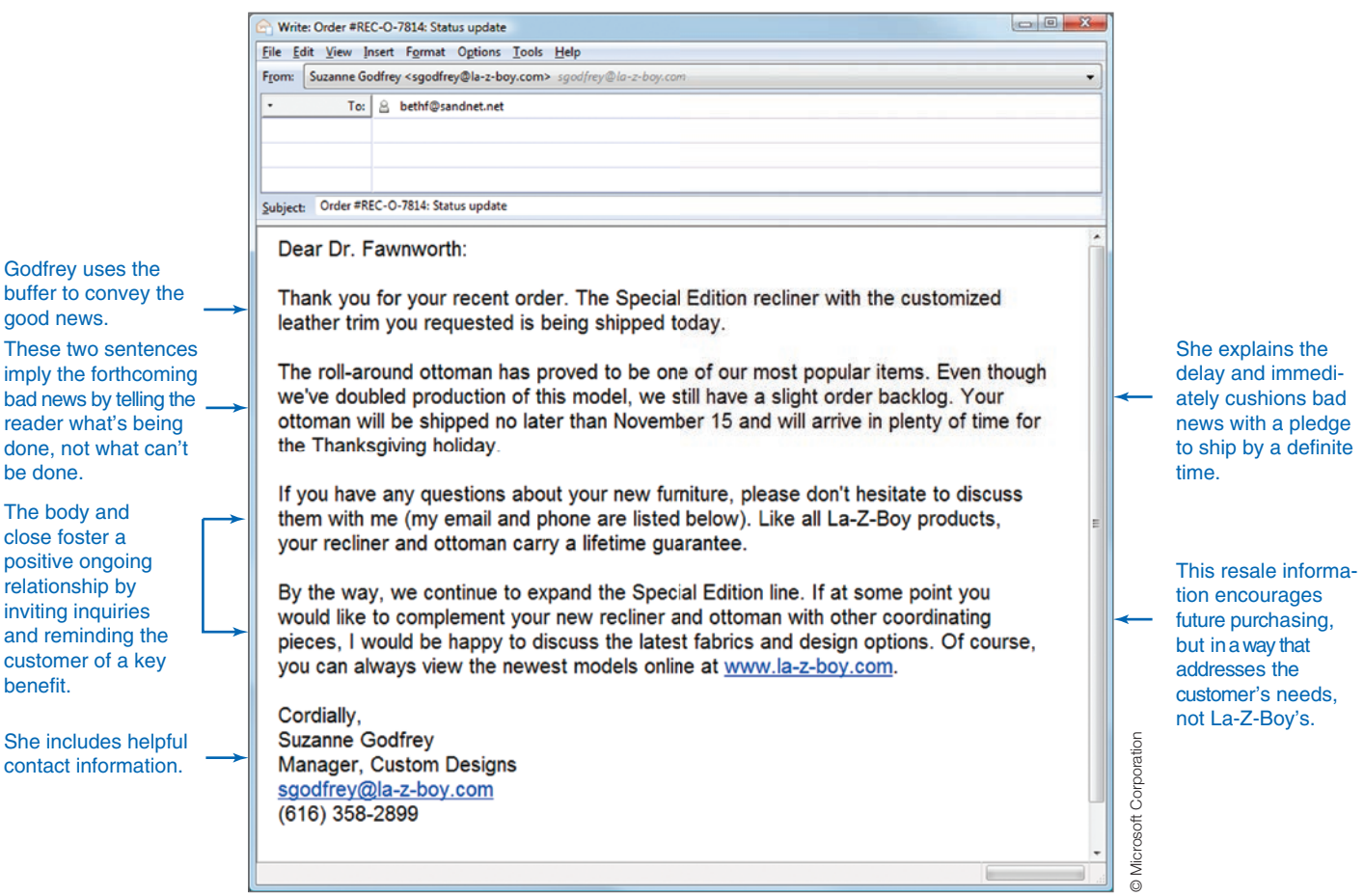


Figure 11.4 Effective Negative Message Regarding a Transaction
This message, which is a combination of good and bad news, uses the indirect approach—with the good news serving as a buffer for the bad news. In this case, the customer wasn't promised delivery by a certain date, so the writer simply informs the customer when to expect the rest of the order. The writer also takes steps to repair the relationship and encourage future business with her firm.

CHECKLIST Handling Bad News About Transactions

- Reset the customer's expectations regarding the transaction.
- Explain what happened and why, if appropriate.
- Explain how you will resolve the situation.
- Offer a professional, businesslike expression of apology if your organization made a mistake.

If you've failed to meet expectations that you set for the customer, an element of apology should be considered.

of the apology depends on the magnitude of the mistake. For large business-to-business transactions, the customer may want an explanation of what went wrong to determine whether you'll be able to perform as you promise in the future. To review the concepts covered in this section, see "Checklist: Handling Bad News About Transactions."

REFUSING CLAIMS AND REQUESTS FOR ADJUSTMENT

Use the indirect approach in most cases of refusing a claim.

Customers who make a claim or request an adjustment tend to be emotionally involved, so the indirect approach is usually the better choice if you need to deny such a request. Your delicate task as a writer is to avoid accepting responsibility for the unfortunate situation and yet avoid blaming or accusing the customer. To steer clear of these pitfalls, pay special attention to tone. Demonstrate that you understand and have considered the complaint carefully, and then rationally explain why you are refusing the request. Close on a respectful and action-oriented note (see Figure 11.5). And be sure to respond quickly. With so many instantaneous media choices at their disposal, some angry consumers will take their complaints public if they don't hear back from you within a few days or even a few hours.[6]

MOBILE APP

Pocket Letter Pro for iOS includes templates for a variety of letter types to simplify writing business letters on your mobile device.

If you deal with lots of customers over time, chances are you'll get a request that is particularly outrageous. You may even be convinced that the person is not telling the truth. However, you must resist the temptation to call the person dishonest or incompetent. If you don't, you could be sued for *defamation*, a false statement that damages someone's reputation. (Written defamation is called *libel*; spoken defamation is called *slander*.) To successfully sue for defamation, the aggrieved party must prove (1) that the statement is false, (2) that the language injures the person's reputation, and (3) that the statement has been communicated to others.

Defamation is a false statement that damages someone's reputation.

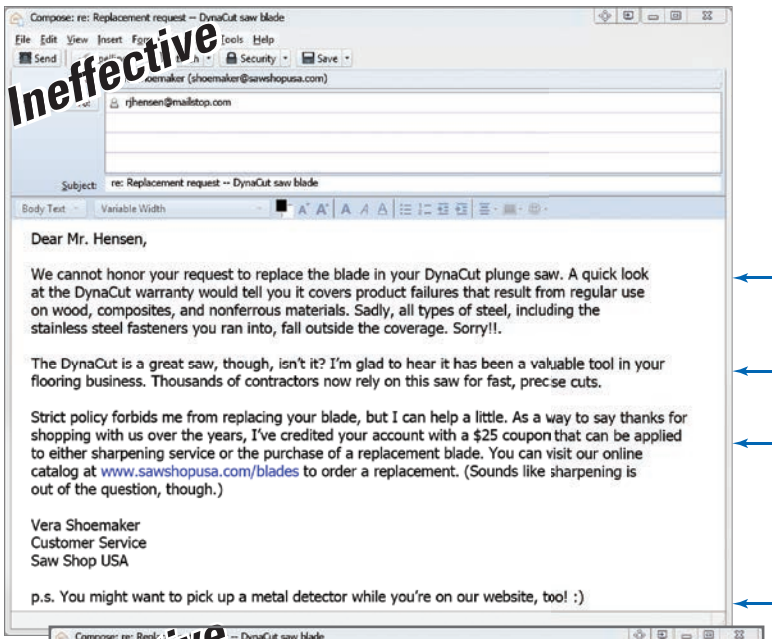
To avoid accusations of defamation, follow these guidelines:

- Avoid using any kind of abusive language or terms that could be considered defamatory.
- Provide accurate information and stick to the facts.
- Never let anger or malice motivate your messages.
- Consult your company's legal advisers whenever you think a message might have legal consequences.
- Communicate honestly and make sure you believe what you're saying is true.
- Emphasize a desire for a good relationship in the future.

Keep in mind that nothing positive can come out of antagonizing a customer, even one who has verbally abused you or your colleagues. Reject the claim or request for adjustment in a professional manner and move on to the next challenge. For a brief review of the tasks involved when refusing claims, see "Checklist: Refusing Claims."

CHECKLIST Refusing Claims

- Use the indirect approach because the reader is expecting or hoping for a positive response.
- Indicate your full understanding of the nature of the complaint.
- Provide an accurate, factual account of the transaction.
- Emphasize ways things should have been handled rather than dwell on the reader's negligence.
- Avoid any appearance of defamation.
- Avoid expressing personal opinions.
- End with a positive, friendly, helpful close.
- Make any suggested action easy for readers to comply with.

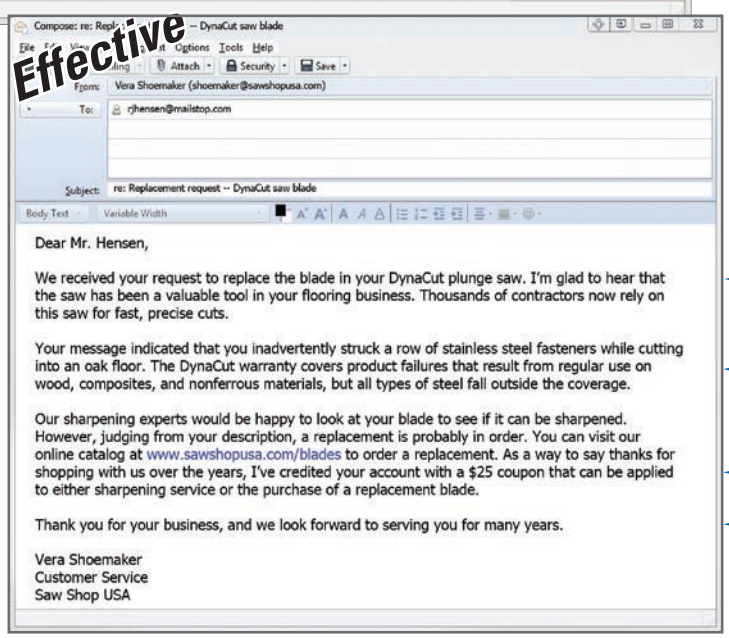


(a) The direct approach is not the right choice for this message, and the opening is way too blunt, even for the direct approach. The second sentence is somewhat insulting, and "Sadly" and "Sorry!!" sound unprofessional.

(b) This upbeat paragraph, coming immediately after the disappointing and insulting opening, will only annoy the reader.

(c) The information about the $25 coupon is positive and presented well. However, hiding behind "policy" in the first sentence only tells the reader that the company is unwilling to consider each customer's needs individually.

(d) This misguided attempt at humor is insulting. The reader already knows about the problem; he wants a solution.



(a) Using the indirect approach, the opening confirms the customer's claim, letting him know his request has been considered. The writer also confirms the high level of satisfaction with the product in general—signaling that the situation is not a product problem.

(b) The second paragraph offers more confirmation that the reader's message was heard. The description of the warranty lays out the reasoning for the refusal, which is presented indirectly at the end of the paragraph.

(c) The writer continues with helpful advice and the offer of a $25 discount that will help the customer solve his problem.

(d) The closing is respectful and looks to the future on a positive note.

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Figure 11.5 Message to Refuse a Claim
Vera Shoemaker diplomatically refuses this customer's request for a replacement saw blade, which he inadvertently damaged after cutting into some steel fasteners. Without blaming the customer (even though the customer clearly made a mistake), she points out that the saw blade is not intended to cut steel, so the warranty doesn't cover a replacement in this instance.

Sending Negative Organizational News

The messages described in the previous section deal with internal matters or individual interactions with external parties. From time to time, managers must also share negative information with the public at large and occasionally respond to negative information as well. Most of these situations have unique challenges that should to be addressed on a case-by-case basis, but the general advice offered here applies to all of them.

6 LEARNING OBJECTIVE
List the important points to consider when conveying negative organizational news.

APPLY YOUR SKILLS NOW

PREPARE YOURSELF FOR A DIFFICULT CONVERSATION

No one welcomes the prospect of a difficult conversation, whether it's with a professor, a parent, a spouse, a partner, or anyone else. You may not be able to change the information that needs to be shared, but you can take steps to make the conversation itself less upsetting—and to keep emotions from spiraling out of control. In addition to Chapter 2's advice on listening and nonverbal communication, follow these tips:

- **Don't put it off.** Although it's natural to want to avoid an unpleasant confrontation, waiting usually makes things worse because you must live with the anxiety for that much longer.
- **Don't go in angry.** While you don't want to put off a difficult conversation, don't jump into it if you're still angry about something that happened, even if your anger is justified. Anger can cloud your perception and spur you to make bad decisions or say things you'll regret. Find a way to cool off first.
- **Don't make excuses.** If you made a mistake or failed to meet a commitment, own up to it. You'll feel better about yourself and earn respect from the other person.
- **See things from the other side.** Regardless of who is at fault—if anyone—take a moment to consider what the other person is going through.
- **Ask for help if you need it.** Admitting you need help can be a difficult step. However, if you're in trouble, the bravest course is often to ask for help.
- **Be the boss of your own emotions.** Be conscious of your emotions and actively control them; don't let them control you. This is not easy, but it can be done.
- **Be kind.** Unless someone is taking advantage of you, you will never regret being kind.

COACH YOURSELF

1. Do you ever find your emotions running away from you when you're having a difficult conversation? What steps could you take to keep them under control?
2. Is there a difficult conversation that you're putting off right now? If so, imagine the relief you'll feel once you get it over with. Even if it's likely to be a painful experience, it could be the start of repairing a damaged relationship or getting your life back on track.

COMMUNICATING UNDER NORMAL CIRCUMSTANCES

Negative organizational messages often require extensive planning because multiple audiences can be involved.

Businesses may need to send a range of negative messages regarding their ongoing operations. As you plan such messages, take extra care to consider all your audiences and their unique needs. Keep in mind that a significant negative event such as a plant closing can affect hundreds or thousands of people in multiple stakeholder groups, from employees to suppliers to government agencies.

When making negative announcements, follow these guidelines:

- **Match your approach to the situation.** A modest price increase won't shock most customers, so the direct approach is fine. Canceling a product that many people count on is another matter, so building up to the news via the indirect approach might be better.
- **Consider the unique needs of each group.** As the plant closing example illustrates, various people have different information needs.

Give people as much time as possible to react to negative news.

- **Give each audience enough time to react as needed.** Negative news often requires readers to make decisions or take action in response, so don't increase their stress by not providing any warning.
- **Give yourself enough time to plan and manage a response.** Chances are you're going to be hit with complaints, questions, or product returns after you make your announcement, so make sure you're ready with answers and additional follow-up information.
- **Look for positive angles, but don't exude false optimism.** If eliminating a seldom-used employee benefit means the company can invest more in advertising, by all means promote that positive angle. On the other hand, laying off 10,000 people does not give them "an opportunity to explore new horizons." It's a traumatic event that can affect employees, their families, and their communities for years. The best you may be able to do is to thank people for their past support and wish them well in the future.

Don't go it alone: Ask for legal help and other assistance if you're not sure how to handle a significant negative announcement.

- **Seek expert advice if you're not sure.** Many significant negative announcements have important technical, financial, or legal elements that require the expertise of lawyers, accountants, or other specialists.

Negative situations will challenge you as a communicator and leader. Inspirational leaders try to seize such opportunities as a chance to reshape or reinvigorate the organization, and they offer encouragement to those around them (see Figure 11.6).

Ineffective

Pulling the plug on Triton

JUNE 6 BY OSCAR HUERTA LEAVE A COMMENT

Most of you probably don't follow the costs of materials on the world market, but let me tell you, it's been brutal for those of us who do. We're seeing some major increases in the cost of high-grade steel, ceramics, and semiconductor-grade silicon. We can accommodate moderate increases in these costs by raising our list prices, but there's only so far we can raise prices before sales start to drop.

Of course, we periodically revisit our sales forecasts for products in development, to make sure our revenue projections are valid. Sad to say, Triton looks like it will get hammered when it hits the market. AMG Magnetics recently introduced a product that will compete directly with Triton, and it has both higher performance and a lower price.

This won't come as a surprise to anyone who has been looking at the numbers: We have to pull the plug on Triton. It just won't fly under these new circumstances.

Now, I don't want to hear any gossip about the Triton team failing or not being up to the task or whatever. Sue Wentworth and her crew have been putting in long hours for months, and it was tough for me at the other top managers to deliver this news.

Disruptions like this always start the rumor mill going about job security, so I'm happy to report that there is no need to worry. We have plenty of other projects that could use some extra help, and other project managers are already lobbying to get their hands on the Triton staffers.

By the way, these reviews are something the management team does every quarter to make sure we focus our time and investment on new products with the greatest potential for strong sales and profit levels, the management team reviews the costing analysis and sales projections for every R&D project once a quarter. Sometimes circumstances change after we launch a project, and the financial assumptions we made at that point might no longer be valid.

- (a) The writer attempts the indirect approach in the body of the message but gives away the bad news in the headline of the blog post.
- (b) This opening makes it more about the writer than the readers or the company in general.
- (c) Saying that Triton "will get hammered when it hits the market" is too blunt for such a sensitive message.
- (d) He started the post by saying most people don't look at the numbers, so this news will come as a surprise. Also, "pull the plug" and "It just won't fly" feel too flippant for such an important message.
- (e) This remark about gossip introduces an additional layer of negativity that serves no purpose.
- (f) This paragraph has positive information about job security, but it starts with an unnecessary negative remark about the rumor mill.
- (g) This information would make a good buffer (see the effective example), but it makes a poor close because it doesn't leave the reader with anything to feel good about.

Effective

Triton project: important update

JUNE 6 BY OSCAR HUERTA LEAVE A COMMENT

As part of the ongoing effort to make sure we focus our time and investment on new products with the greatest potential for strong sales and profit levels, the management team reviews the costing analysis and sales projections for every R&D project once a quarter. Conducting these reviews every quarter gives us time to respond in the event that current circumstances no longer align with the financial assumptions we made when a particular project was launched.

On the cost side of the equation, we're seeing some major increases in the cost of high-grade steel, ceramics, and semiconductor-grade silicon. We can accommodate moderate increases in these costs by raising our list prices, but there's only so far we can raise prices before sales start to drop.

Regarding sales projections, our forecasts still look solid for every new product, except for the Triton project. AMG Magnetics recently introduced a product that will compete directly with Triton, and it has both higher performance and a lower price. Accordingly, we have had to reduce Triton's sales forecasts by 35 percent.

Unfortunately, the increase in material costs and the decrease in projected sales volume put Triton in an impossible position. We believe the company has better opportunities for investing our development capital and the time and energy of our talented engineering staff. Accordingly, we have decided to cancel Triton, effectively immediately.

Please rest assured that this will not affect staffing levels. We have plenty of other projects that can use some extra help, and other project managers are already lobbying to get the Triton staffers on their teams.

Please join me in thanking Sue Wentworth and everyone on the Triton team for the months of dedication and creativity they devoted to this project. I know they are disappointed in this outcome but recognize the necessity of focusing on our brightest prospects.

- (a) The post title preserves the indirect approach by not giving away the bad news.
- (b) The opening serves as an effective buffer because it explains the process that was used to reach the decision. This will put the audience in a rational frame of mind, rather than an emotional one.
- (c) This paragraph conveys the first of the two reasons that led to the decision, and it does so in a calm but authoritative way.
- (d) This paragraph shares the second reason and narrows the focus from all products to just the Triton project. At this point, readers should be prepared for the bad news that is coming.
- (e) He delivers the bad news while keeping the focus on the project and its financial parameters. He also immediately shifts into a positive stance, talking about the talented staff and other opportunities.
- (f) This paragraph puts to rest any worries other readers will have about their jobs.
- (g) The close is respectful and demonstrates sensitivity toward the people most affected by the decision.

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Figure 11.6 Internal Message Providing Bad News About Company Operations

The cancellation of a major development project before completion can be a traumatic event for a company's employees. People who worked on the project are likely to feel that all their time and energy were wasted and to worry that their jobs are in jeopardy. Employees who didn't work on the project might worry about the company's financial health and the stability of their own jobs. Such messages are therefore prime candidates for the indirect approach. Note how much more effectively the revised version manages the reader's emotions from beginning to end.

RESPONDING TO NEGATIVE INFORMATION IN A SOCIAL MEDIA ENVIRONMENT

For all the benefits they bring to business, social media have created a major new challenge: responding to online rumors, false information, and attacks on a company's reputation. Customers who believe they have been treated unfairly can turn to Twitter, Facebook, and other tools to use public exposure as leverage.

Responding effectively to rumors and negative information in social media requires continual engagement with stakeholders and careful decision-making about which messages should get a response.

False rumors and both fair and unfair criticisms can spread around the world in a matter of minutes. Responding to rumors and countering negative information require an ongoing effort and case-by-case decisions about which messages require a response. Follow these four steps:[7]

- **Engage early, engage often.** The most important step in responding to negative information must be done *before* the negative information appears, and that is to engage with communities of stakeholders as a long-term strategy. Companies that have active, mutually beneficial relationships with customers and other interested parties are less likely to be attacked unfairly online and more likely to survive such attacks if they do occur. In contrast, companies that ignore constituents or jump into "spin doctor" mode when a negative situation occurs don't have the same credibility as companies that have done the long, hard work of fostering relationships with stakeholders.
- **Monitor the conversation.** If people are interested in what your company does, chances are they are blogging, tweeting, podcasting, posting videos, posting on Facebook, and otherwise sharing their opinions. Use the available technologies to listen to what people are saying.
- **Evaluate negative messages.** When you encounter negative messages, resist the urge to fire back immediately. Instead, evaluate the source, the tone, and the content of the message—and then choose a response that fits the situation. For example, the Public Affairs Agency of the U.S. Air Force groups senders of negative messages into four categories: "trolls" (those whose only intent is to stir up conflict), "ragers" (those who are just ranting or telling jokes), "the misguided" (those who are spreading incorrect information), and "unhappy customers" (those who have had a negative experience with the Air Force).
- **Respond appropriately.** After you have assessed a negative message, make the appropriate response based on an overall public relations plan. The Air Force, for instance, doesn't respond to trolls or ragers, responds to misguided messages with correct information, and responds to unhappy customers with efforts to rectify the situation and reach a reasonable solution. In addition to replying promptly, make sure your response won't make the situation worse. For example, taking legal action against critics, even if technically justified, can rally people to their defense and create a public relations nightmare. In some instances, the best response is to contact a critic privately to attempt a resolution away from the public forum.

MOBILE APP

The **Yelp** mobile app is an easy way to keep the consumer review site at your fingertips—and to monitor what's being said about your business.

Whatever you do, keep in mind that positive reputations are an important asset and need to be diligently guarded and defended. Everybody has a voice now, and some of those voices don't care to play by the rules of ethical communication.

COMMUNICATING IN A CRISIS

Some of the most critical instances of business communication occur during crises, which can include industrial accidents, crimes or scandals involving company employees, on-site hostage situations, terrorist attacks, information theft, product tampering incidents, and financial calamities. During a crisis, customers, employees, local communities, and others will demand information. In addition, rumors can spread unpredictably and uncontrollably. You can also expect the news media to descend quickly, asking questions of anyone they can find.

A *crisis management plan* defines operational procedures to deal with a crisis, including communication tasks and responsibilities.

The key to successful communication efforts during a crisis is having a **crisis management plan**. In addition to defining operational procedures to deal with a crisis, this plan outlines communication tasks and responsibilities, which can include everything from media contacts to news release templates (see Table 11.3). The plan should clearly specify which people are authorized to speak for the company, provide contact

TABLE 11.3 How to Communicate in a Crisis

When a Crisis Hits:	
Do	**Don't**
Prepare for trouble ahead of time by identifying potential problems, appointing and training a response team, and preparing and testing a crisis management plan	Blame anyone for anything
Get top management involved immediately	Speculate in public
Set up a news center for company representatives and the media that is equipped with phones, computers, and other tools for preparing news releases and online updates	Refuse to answer questions
At the news center, take the following steps: • Issue frequent news updates and have trained personnel available to respond to questions around the clock • Provide complete information packets to the media as soon as possible • Prevent conflicting statements and provide continuity by appointing a single person trained in advance to speak for the company • Tell receptionists and other employees to direct all phone calls to the designated spokesperson in the news center • Provide updates when new information is available via blog postings, Twitter updates, text messaging, Facebook, and other appropriate media	Release information that will violate anyone's right to privacy Use the crisis to pitch products or services Play favorites with media representatives
Tell the whole story—openly, completely, and honestly; if you are at fault, apologize	
Demonstrate the company's concern by your statements and your actions	

information for all key executives, and include a list of the news outlets and social media tools that will be used to disseminate information.

Although you can't predict catastrophes, you can prepare for them. Analysis of corporate crises over the past several decades reveals that companies that respond quickly with the information people need tend to fare much better in the long run than those that go into hiding or release inconsistent or incorrect information.[8]

Sending Negative Employment Messages

7 LEARNING OBJECTIVE
Describe successful strategies for sending negative employment-related messages.

Recipients have an emotional stake in negative employment messages, so the indirect approach is usually the best choice.

As a manager, you will find yourself in a variety of situations in which you have to convey bad news to individual employees or potential employees. Even if you're not in a supervisory role, you may need to reject requests for recommendations.

Recipients have an emotional stake in these messages, so the indirect approach is usually your best choice. In addition, use great care in selecting the medium and channel for each situation. For instance, email and other written forms let you control the message and avoid personal confrontation, but one-on-one conversations are likely to be viewed as more sensitive and give both sides the opportunity to ask and answer questions.

REFUSING REQUESTS FOR RECOMMENDATIONS AND REFERENCES

Saying no when someone asks you to write a recommendation or serve as a reference is an unpleasant but sometimes necessary task. Remind yourself of two points. First, you're never under any obligation to provide a recommendation or serve as a reference. Second, if you have legitimate reasons to refuse the request, the long-term consequences of providing one anyway could be much more negative for you and the other party than the short-term disappointment of saying no.[9]

A careful and sensitive approach to negative employment messages can make the task less emotionally draining for you while minimizing the disappointment for the recipient.

By taking a careful and sensitive approach, you can make the task less emotionally draining for yourself while minimizing the disappointment for the other person. Note that if you're being asked to give a recommendation in your official capacity as a representative of your firm, you need to be aware of your company's policies. To avoid lawsuits from former employees who receive negative references during background checks,

many companies no longer offer anything more than confirmation of employment and don't allow managers to give recommendations as personal communication.[10]

Ideally, someone whose performance was inadequate in your past working relationship will be self-aware enough not to ask for a recommendation. And if you had been the person's supervisor, it would have been your responsibility to share this information.[11]

If you are in a position to write a recommendation but choose not to, here are several options:[12]

Here are several options for rejecting a request for a recommendation:
- Disqualify yourself by saying you're not the best person to write it.
- Suggest someone else to write it.
- Take a mentoring approach and suggest a different career path.
- Explain that you have a personal policy against writing recommendations.

- **Disqualify yourself.** With this approach, you simply say something along the lines of "I'm not in a good position to offer an objective assessment" or "I'm not the best person to be giving you a recommendation for this opportunity." This approach will feel most natural in situations where you didn't have a close working relationship.
- **Suggest an alternative.** If you believe the person is qualified but you don't want to provide the reference, you can suggest someone else. You don't have to name anyone in particular, but perhaps suggest he or she ask another former supervisor.
- **Take a mentoring approach.** Remember that being asked to provide a recommendation is a reflection of the respect the person has for you and your position. If you have had a formal or informal mentoring relationship and want to help, you can respectfully explain why you don't think this opportunity is a good path to follow and perhaps offer some guidance about how to find the right opportunity.
- **Explain your personal policy.** If you haven't had a close working relationship or aren't motivated to continue one into the future, you can say that "in the interest of simplicity, I've opted not to provide recommendations."

Whichever course you take, be sure to establish a respectful tone, and don't go overboard with an apology (you've done nothing wrong). Also, avoid any phrasing that might lead to false hopes or continued communication on the matter. For example, if you truly intend to say no, don't say "I can't do it just now" or "let me review your previous performance evaluations."

REFUSING SOCIAL NETWORKING RECOMMENDATION REQUESTS

Making recommendations in a social networking environment is more complicated than with a traditional recommendation letter because the endorsements you give become part of your online profile. On a network such as LinkedIn, others can see whom you've recommended and what you've written about these people. Much more so than with traditional letters, then, the recommendations you make in a social network become part of your personal brand.[13] Moreover, networks make it easy to find people and request recommendations, so chances are you will get more requests than you would have otherwise—and sometimes from people you don't know well.

Social networks have created new challenges in recommendation requests, but they also offer more flexibility in responding to these requests.

Fortunately, social networks give you a bit more flexibility when it comes to responding to these requests. One option is to simply ignore or delete the request. Of course, if you do know a person, ignoring a request could create an uncomfortable situation, so you will need to decide each case based on your relationship with the requester. Another option is to refrain from making recommendations at all and just let people know this policy when they ask. Whatever you decide, remember that it is your choice.[14]

If you choose to make recommendations and want to respond to a request, you can write as much or as little information about the person as you are comfortable sharing. Unlike the situation with an offline recommendation, you don't need to write a complete letter. You can write a brief statement, even just a single sentence that focuses on one positive aspect.[15] This flexibility allows you to respond positively in those situations in which you have mixed feelings about a person's overall abilities.

REJECTING JOB APPLICATIONS

Application rejections are routine communications, but saying no is never easy, and recipients are emotionally invested in the decision. Moreover, companies must take care to avoid illegal or unethical bias in their employment decisions—or even the appearance of

unfairness. Of course, having fair and nondiscriminatory hiring practices is essential, but rejections must also be written in a way that doesn't inadvertently suggest any hint of discrimination. Expert opinions differ on the level of information to include in a rejection message, but the safest strategy is to avoid sharing any explanations for the company's decision and to avoid making or implying any promises of future consideration (see Figure 11.7):[16]

The safest strategy for rejecting job applications is a minimalist approach that doesn't explain the reasons for the decision.

- **Personalize the message by using the recipient's name.** "Dear Applicant" can make it sound as though you never bothered to read the application.
- **Open with a courteous expression of appreciation for having been considered.** In a sense, this opening is like the buffer in an indirect message because it gives you an opportunity to begin the conversation without immediately and bluntly telling the reader that his or her application has been rejected.
- **Convey the negative news politely and concisely.** The passive voice is helpful in this situation because it depersonalizes the response. For example, "Your application was not among those selected for an interview" is less blunt than the active phrase "We have rejected your application."
- **Avoid explaining why an applicant was rejected or why other applicants were chosen instead.** Although it was once more common to offer such explanations, the simplest strategy from a legal standpoint is to avoid offering reasons for the decision. Avoiding explanations lowers the possibility that an applicant will perceive discrimination in the hiring decision or be tempted to challenge the reasons given.
- **Don't state or imply that the application will be reviewed at a later date.** Saying that "we will keep your résumé on file for future consideration" can create false hopes for the recipient and leave the company vulnerable to legal complaints if a future hiring decision is made without actually reviewing this candidate's application again. If the candidate might be a good fit for another position in the company in the future, you can suggest he or she reapply if a new job opening is posted.
- **Close with positive wishes for the applicant's career success.** A brief statement such as "We wish you success in your career" is sufficient.

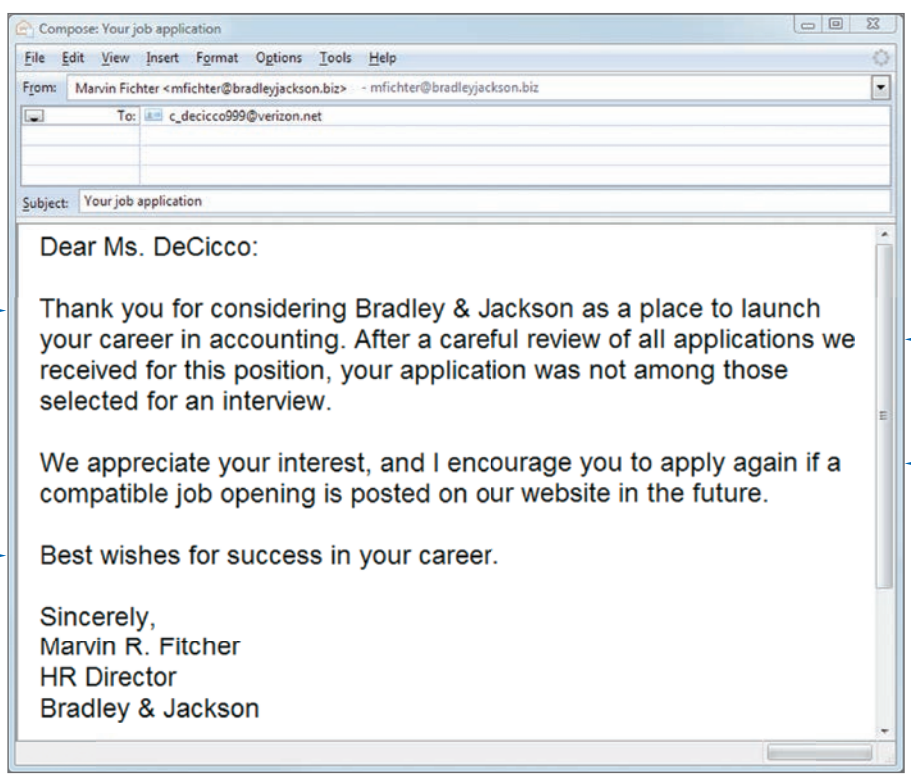


Figure 11.7 Effective Message Rejecting a Job Applicant
This message rejecting a job applicant takes care to avoid making or implying any promises about future opportunities, beyond inviting the person to apply for positions that may appear in the future. Note that this would not be appropriate if the company did not believe the applicant was a good fit for the company in general.

Naturally, you should adjust your tactics to the circumstances. A simple and direct written message is fine when someone has only submitted a job application, but a phone call might be more appropriate for rejecting a candidate who has made it at least partway through the interview process.

GIVING NEGATIVE PERFORMANCE REVIEWS

Conventional *performance reviews* are written reports combined with in-person discussion between manager and employee.

Performance reviews are periodic evaluations of employee performance designed to clarify job requirements, give employees feedback on their performance, and establish personal action plans. The traditional annual performance review combines a written assessment with a one-on-one conversation in which the manager shares the review with the employee and discusses the evaluation. Reviews often include a scoring system that can be used to rank employees and establish target pay levels.

Although this approach has been widely used for years, it has some potential weaknesses: Writing these reports consumes a lot of management's time, the long gaps between evaluations can result in employees drifting far off course before getting corrective input, and ranked evaluations can foster an unhealthy atmosphere of competition in the workplace.[17]

In response to these issues, some companies have abandoned the traditional annual review in favor of shorter and more frequent forms of feedback. Some have dropped written reviews altogether in favor of ongoing coaching and feedback sessions between managers and employees, simpler survey methods, and the use of feedback apps.[18] Salesforce.com, for example, replaced performance reviews with its custom Feedback App, which enables all employees to give and receive feedback in real time. The benefits include recognizing contributions when they occur and addressing performance issues quickly.[19]

If you need to give an employee a negative appraisal, using whatever approach and media your company embraces, take steps to help ensure fair and objective reviews:[20]

Negative evaluations should be based on objective, documented evidence.

- **Base your evaluation on concrete, documented evidence.** To avoid basing your evaluation on vague impressions and "gut feelings," be sure to compile objective performance evidence throughout the period leading up to the evaluation. From the employee's perspective, if you don't have detailed evidence, a negative review can come across as a personal attack. This detailed evidence also gives the employee examples of specific behaviors to repeat or avoid.
- **Don't focus on just the negative elements.** Negative behaviors and decisions tend to stick out from the norm, so it's easy to focus on them and overlook positive aspects of performance.

Give employees ample opportunity to ask questions and respond to a negative evaluation.

- **Make it a conversation, not a lecture.** Give the employee the opportunity to respond to your feedback and ask questions.
- **Don't avoid difficult topics.** Pretending that problems don't exist is harmful for everyone, including the employee.
- **Make sure your written and oral communication match.** If you write a strongly negative assessment but then gloss over the problems to avoid an uncomfortable live conversation, for example, you'll send mixed messages.
- **Evaluate all employees consistently.** Consistency not only is fair but also helps protect the company from claims of discriminatory practices.
- **Maintain a calm, objective tone.** Whether it's in writing or in person, manage the emotions of the situation by maintaining a professional tone. Be mindful of your nonverbal signals, too.
- **Focus on opportunities for improvement.** This information can serve as the foundation for an improvement plan for the coming year.

TERMINATING EMPLOYMENT

If an employee's performance cannot be brought up to company standards or if other factors, such as declining sales, cause a reduction in the workforce, a company often has no choice but to terminate employment. As with other negative employment messages, termination is fraught with emotions and legal ramifications, so careful planning, complete documentation, and sensitive writing and conversational skills are essential.

Termination messages should always be written with input from the company's legal staff, but here are general guidelines to bear in mind:[21]

Termination letters require objective documentation and sensitive language to avoid creating undue ill will and grounds for legal action.

- Whatever the reasons for the decision, present them clearly and objectively using calm language. For performance-related terminations, provide the company's evidence for making the decision.
- If the termination is related to an individual's performance, avoid framing these problems as personality conflicts or other vague issues.
- Avoid any suggestion that someone else was behind the decision or that you don't agree with it. Otherwise, you could create the impression that the firing decision is unfair or open to negotiation.
- Follow all company policies, contractual requirements, and applicable state and federal laws.
- Deliver the termination letter in person if possible. Arrange a meeting that will ensure privacy and freedom from interruptions.
- Be prepared for questions that the employee is likely to have, such as what will happen to his or her retirement benefits.
- Avoid surprises. Unless an employee exhibited some unexpected behavior that warrants immediate termination, firing shouldn't come as a surprise. Through regular and honest feedback, underperforming employees should be made aware of their shortcomings and given opportunities to improve.
- If there are legitimately positive aspects to the decision, share those with the employee. For example, if you recognize that even though someone hasn't worked out in his or her current job but could excel in a different role in another company, share that information as a way to help the employee transition to a more successful situation.

Any termination is clearly a negative outcome for the employee, but careful attention to content and tone in the termination message can help the employee move on gracefully and minimize the misunderstandings and anger that can lead to expensive lawsuits. To review the tasks involved in this type of message, see "Checklist: Writing Negative Employment Messages."

CHECKLIST ✓ Writing Negative Employment Messages

A. Refusing requests for employee references and recommendations

- Don't feel obligated to write a recommendation letter if you don't feel comfortable doing so.
- Take a diplomatic approach to minimize hurt feelings.
- Suggest alternatives, if available.
- Use the options available to you on social networks, such as ignoring a request from someone you don't know or writing a recommendation on a single positive attribute.

B. Rejecting job applicants

- If possible, respond to all applications, even if you use only a form message to acknowledge receipt.
- If you use the direct approach, take care to avoid being blunt or cold.
- If you use the indirect approach, don't mislead the reader in your buffer or delay the bad news for more than a sentence or two.
- Avoid explaining why the applicant was rejected.
- Suggest alternatives if possible.

C. Giving negative performance reviews

- Document performance problems throughout the year.
- Evaluate all employees consistently.
- Keep job descriptions up to date as employee responsibilities change.
- Maintain an objective and unbiased tone.
- Use nonjudgmental language.
- Focus on problem resolution.
- Make sure negative feedback is documented and shared with the employee.
- Don't avoid confrontations by withholding negative feedback.
- Ask the employee for a commitment to improve.

D. Terminating employment

- State your reasons accurately and make sure they are objectively verifiable.
- Avoid statements that might expose your company to a wrongful termination lawsuit.
- Consult company lawyers to clarify all terms of the separation.
- Deliver the letter in person if possible.
- End the relationship on terms as positive as possible.

COMMUNICATION CHALLENGES AT Wells Fargo

You've joined Wells Fargo as a department manager, and in this role you face the usual range of communication challenges that all managers face. Use what you've learned in this chapter to address the following situations.

INDIVIDUAL CHALLENGE: Another manager stopped by this morning with a request to borrow two of your best risk management specialists for a three-week emergency. Under normal conditions, you wouldn't hesitate to help, but your team has its own scheduling challenges to deal with. Plus, this isn't the first time this manager has run into trouble, and you suspect that poor project management is the reason. In one or two sentences, diplomatically state your refusal to help while suggesting that your colleague could avoid these endless crises with better project management practices.

TEAM CHALLENGE: You've found it easy to say yes to recommendation letter requests from former employees who were top performers, and you've learned to say no to those people who didn't perform so well. The requests you struggle with are from employees in the middle—people who didn't really excel but didn't really cause any trouble either. You've just received a request from a computer systems specialist who falls smack in the middle of the middle. Unfortunately, he's applying for a job at a firm that you know places high demands on its employees and generally hires the best of the best. He's a great person, and you'd love to help, but in your heart you know that if by some chance he does get the job, he probably won't last. Plus, you don't want to get a reputation in the industry for recommending weak candidates. With your team, brainstorm a sensitive but effective buffer that will help you set the stage for the negative news.

Key Terms

buffer A neutral, noncontroversial statement that establishes common ground with the reader in an indirect negative message

crisis management plan Plan that defines operational procedures to deal with a crisis, including communication tasks and responsibilities

performance review Employee evaluation procedure giving feedback on performance and guidance for future efforts

whistle-blowing Efforts by employees to report concerns about unethical or illegal behavior

Summary Of Learning Objectives

1 Apply the three-step writing process to negative messages. Because the way you convey negative information can be as damaging as the fact that you're conveying it, planning negative messages carefully is crucial. Make sure your purpose is specific, necessary, and appropriate for the medium you've chosen. Find out how your audience prefers to receive bad news. Collect all the facts necessary to support your negative decision, and adapt your tone to the situation as well as to your audience. Negative messages may be organized according to the direct or the indirect approach, and your choice depends on audience preference as well as on the situation. In addition, carefully choose positive words to construct diplomatic sentences. Finally, revision, design, and proofreading are necessary to ensure that you are saying exactly what you want to say in the best possible way and that careless errors don't aggravate an already emotional situation.

2 Explain how to use the direct approach effectively when conveying negative news. The direct approach to negative messages puts the bad news up front, follows with the reasons (and perhaps offers an alternative), and closes with a respectful statement that is as positive as possible under the circumstances. Use the direct approach when you know your audience prefers receiving bad news up front or if the bad news will cause readers relatively little pain or disappointment. Otherwise, use the indirect approach. Even though it is direct, however, don't use the direct approach as a license to be rude or overly blunt.

3 Explain how to use the indirect approach effectively when conveying negative news. The indirect approach for negative messages begins with a buffer (a neutral or positive statement to establish common ground with the reader), explains the reasons leading up to the decision or news, clearly states the negative news without unduly emphasizing it, and closes with a respectful statement. When using the indirect approach, you need to be careful to avoid obscuring the bad news or misleading your audience into thinking you're actually delivering good news. The key to avoiding both problems is remembering that the purpose of the indirect approach is to cushion the blow, not to avoid delivering it. When using a buffer, you must be sure it is neither deceptive nor insincere. To write an effective buffer, look for opportunities to express your appreciation for being considered, to assure your reader of your attention to the request, or to indicate your understanding of the reader's needs.

4 Explain the importance of maintaining high standards of ethics and etiquette when delivering negative messages. Ethics and etiquette are important in every message, of course, but they take on particular significance with negative messages for three reasons. First, the communicator often needs to adhere to a variety of laws and regulations when delivering negative messages. Second, good ethical practice demands care and sensitivity in the content and delivery of negative messages, as these messages can have a profoundly negative effect on the people who receive them. Third, communicators need to manage their own emotions when crafting and distributing negative messages while at the same time considering the emotional needs of their audiences.

5 Describe successful strategies for sending negative messages on routine business matters. When making negative announcements on routine business matters, the indirect approach is usually preferred, although the direct approach can work for minor issues. When rejecting suggestions and proposals, tailor the approach to the situation. An unsolicited proposal from an external source doesn't need as much of your attention as a solicited proposal from an internal source, for example. For refusing routine requests, the direct approach is usually sufficient, except when the matter at hand is significant, you or your company have an established relationship with the person making the request, or you're forced to decline a request that you might have said yes to in the past.

When conveying bad news about transactions, you need to modify the customer's expectations, explain how you plan to resolve the situation, and repair whatever damage might have been done to the business relationship. Whether you should apologize depends in part on the magnitude of the situation and whether you previously established specific expectations about the transaction.

When refusing a claim or a request for adjustment, the indirect approach is usually preferred because the other party is emotionally involved and expects you to respond positively. Demonstrate that you understand and have carefully considered the complaint, and then rationally and calmly explain why you are refusing the request.

6 List the important points to consider when conveying negative organizational news. Public communications about various organization matters fall into two categories: those you can plan for (and therefore have more time to prepare messages) and crises that hit without warning. The first category includes a variety of announcements, from relatively minor matters, such as price increases, to major matters, such as layoffs and bankruptcy proceedings. For these messages, be sure to match your approach to the situation, consider the unique needs of each audience group, give each audience enough time to react as needed, give yourself enough time to plan and manage a response, look for positive angles but don't exude false optimism, and seek expert advice on legal, financial, or technical matters if you're not sure how to proceed.

To respond successfully to rumors and negative information in a social media environment, first be sure you are engaged with important stakeholders before negative situations occur. Second, monitor the conversations taking place about your company and its products. Third, when you see negative messages, evaluate them before responding. Fourth, after evaluating negative messages, take the appropriate response based on an overall public relations plan. Some messages are better ignored, whereas others should be addressed immediately with corrective information.

The second category of negative organizational news involves communication during times of crisis. Preparation is key for successful crisis management. Although you can't anticipate the nature and circumstances of every possible crisis, you can prepare by deciding such issues as who is in charge of communications, where the press and the public can get information, and what will be said in likely emergency scenarios. A good crisis communication plan includes such items as email and phone lists for important media contacts, website templates for various emergency scenarios, and after-hours contact information for key personnel in the company.

7 Describe successful strategies for sending negative employment-related messages. The indirect approach is usually the better choice for negative employment messages because the recipient is always emotionally involved and the decisions are usually significant. When refusing requests from other employers for performance-related information about past employees, your message can be brief and direct. Simply provide whatever information your company allows to be shared in these situations. Refusing a recommendation request directly from a former employee feels much more personal for the recipient, however, so the indirect approach is better. Responding to requests on social networks is somewhat easier because you have the option of recommending just one aspect of a person's overall skill set, even if you can't make an unqualified, overall endorsement.

Messages rejecting job applicants raise emotional and legal issues and therefore must be approached with great care. Experts vary in their advice about how much information to include in these messages. The safest strategy is a brief message that opens with an expression of appreciation for being considered (which functions like a buffer in an indirect message), continues with a statement to the effect that the applicant was not chosen for the position applied for, and closes courteously without providing reasons for the rejection or making promises about future consideration.

Negative performance reviews should take care to document the performance problems, be sure that all employees are being evaluated consistently, be written in a calm and objective voice, and focus on opportunities for improvement. Moreover, they must be written with reference to accurate, current job descriptions that provide the basis for measuring employee performance.

Termination messages are the most challenging employment messages of all. They should clearly present the reasons for the decision, present the reasons in a way that cannot be construed as unfair or discriminatory, follow company policy and any relevant legal guidelines, and avoid personal attacks or insults of any kind. Asking a manager not directly involved in the situation to review your message can help you avoid troublesome wording or faulty reasoning. Finally, try to deliver the written message in person if possible.

Test Your Knowledge

To review chapter content related to each question, refer to the indicated Learning Objective.

11-1. What are the five main goals in delivering bad news? [LO-1]

11-2. Why is it particularly important to select your medium and channel carefully when writing a negative message? [LO-1]

11-3. Under what circumstances should you avoid offering explanations in negative indirect messages? [LO-2]

11-4. What is the sequence of presentation in a negative message that is organized using the indirect approach? [LO-3]

11-5. What is a buffer, and what steps must you take to ensure that buffers you write are ethical? [LO-3]

11-6. What are three techniques for deemphasizing negative news? [LO-3]

11-7. What is whistle-blowing? [LO-4]

11-8. What steps can you take to minimize chances of being accused of defamation when refusing a claim or request for adjustment? [LO-5]

11-9. What are the four recommended steps for responding to rumors and countering negative information in social media? [LO-6]

11-10. What is a crisis management plan? [LO-6]

Apply Your Knowledge

To review chapter content related to each question, refer to the indicated Learning Objective.

11-11. Would you choose the direct or indirect approach to announce that a popular employee benefit is being eliminated for cost reasons? Why? [LO-1]

11-12. Can you express sympathy with someone's negative situation without apologizing for the circumstances? Explain your answer. [LO-2]

11-13. Is intentionally deemphasizing bad news in text the same as distorting graphs and charts to deemphasize unfavorable data? Why or why not? [LO-3]

11-14. Why is it important to be engaged with stakeholders before trying to use social media during a crisis or other negative scenario? [LO-6]

11-15. If your social media monitoring efforts pick up a tweet that accuses your customer service staff of lying and claims to have evidence to back it up, how would you respond? [LO-6]

11-16. Should you ever apologize when giving an employee a negative performance evaluation? Why or why not? [LO-7]

11-17. How would you respond to a LinkedIn network connection who asks for a recommendation when you barely remember working with this person and don't remember whether she was good at her job? [LO-7]

Practice Your Skills

Messages for Analysis

Read the following messages, and then (1) analyze the strengths and weaknesses of each sentence and (2) revise each message so that it follows this chapter's guidelines.

11-18. Sending Negative Organizational News [LO-6]

Dear Traveling Executives:

We need you to start using some of the budget suggestions we are going to issue as a separate memorandum. These include using videoconference equipment and web conferencing instead of traveling to meetings, staying in cheaper hotels, arranging flights for cheaper times, and flying from less-convenient but also less-expensive suburban airports.

The company needs to cut travel expenses by fifty percent, just as we've cut costs in all departments of Black & Decker. This means you'll no longer be able to stay in fancy hotels and make last-minute, costly changes to your travel plans.

You'll also be expected to avoid hotel surcharges for phone calls and Internet access. If the hotel you want to stay in doesn't offer free wireless, go somewhere else. And never, NEVER return a rental car with an empty tank! That causes the rental agency to charge us a premium price for the gas they sell when they fill it up upon your return.

You'll be expected to make these changes in your travel habits immediately.

Sincerely,

M. Juhasz

Travel & Meeting Services

11-19. Refusing Requests for Claims and Adjustments [LO-5]

I am responding to your email of about six weeks ago asking for an adjustment on your wireless hub, model WM39Z. We test all our products before they leave the factory; therefore, it could not have been our fault that your hub didn't work.

If you or someone in your office dropped the unit, it might have caused the damage. Or the damage could have been caused by the shipper if he dropped it. If so, you should file a claim with the shipper. At any rate, it wasn't our fault. The parts are already covered by warranty. However, we will provide labor for the repairs for $50, which is less than our cost, since you are a valued customer.

We will have a booth at the upcoming trade show there and hope to see you or someone from your office. We have many new models of hubs, routers, and other computer gear that we're sure you'll want to see. I've enclosed our latest catalog. Hope to see you there.

11-20. Rejecting Job Applications [LO-7]

I regret to inform you that you were not selected for our summer intern program at Equifax. We had over a thousand résumés and cover letters to go through and simply could not get to them all. We have been asked to notify everyone that we

have already selected students for the 25 positions based on those who applied early and were qualified.

We're sure you will be able to find a suitable position for summer work in your field and wish you the best of luck. We deeply regret any inconvenience associated with our reply.

Exercises

Each activity is labeled according to the primary skill or skills you will need to use. To review relevant chapter content, you can refer to the indicated Learning Objective. In some instances, supporting information will be found in another chapter, as indicated.

Planning: Choosing the Direct or Indirect Approach [LO-1] Select which approach you would use (direct or indirect) for the following negative messages.

11-21. An email message to your boss informing her that one of your key clients is taking its business to a different accounting firm

11-22. An email message to a customer informing her that one of the books she ordered over the internet is temporarily out of stock

11-23. A text message to a customer explaining that the DVD recorder he ordered for his new computer is on backorder and that, as a consequence, the shipping of the entire order will be delayed

11-24. A blog post to all employees notifying them that the company parking lot will be repaved during the first week of June and that the company will provide a shuttle service from a remote parking lot during that period

11-25. A letter from a travel agent to a customer stating that the airline will not refund her money for the flight she missed but that her tickets are valid for one year

11-26. A form letter from a U.S. airline to a customer explaining that the company cannot extend the expiration date of the customer's frequent flyer miles even though the customer was living overseas for the past three years and unable to use the miles during that time

11-27. A letter from an insurance company to a policyholder denying a claim for reimbursement for a special medical procedure that is not covered under the terms of the customer's policy

11-28. A letter from an electronics store stating that the customer will not be reimbursed for a malfunctioning mobile phone that is still under warranty (because the terms of the warranty do not cover damages to phones that were accidentally dropped from a moving car)

11-29. An announcement to the repairs department listing parts that are on back order and will be three weeks late

11-30. **Message Strategies: Refusing Routine Requests [LO-4]** As a customer service supervisor for a mobile phone company, you're in charge of responding to customers' requests for refunds. You've just received an email from a customer who unwittingly ran up a $550 bill for data charges after forgetting to disable his smartphone's Wi-Fi hotspot feature. The customer says it wasn't his fault because he didn't know his roommates were using his phone to get free internet access. However, you've dealt with this situation before and provided a notice to all customers to be careful about excess data charges resulting from the use of the hotspot capability. Draft a short buffer (one or two sentences) for your email reply, sympathizing with the customer's plight but preparing him for the bad news (that company policy specifically prohibits refunds in such cases).

Etiquette: Communicating with Sensitivity and Tact; Collaboration: Team Projects [LO-4] Working alone, revise the following statements to deemphasize the bad news. Then team up with a classmate and read each other's revisions. Did you both use the same approach in every case? Which approach seems to be most effective for each of the revised statements?

11-31. The airline can't refund your money. The "Conditions" section on the back of your ticket states that there are no refunds for missed flights. Sometimes the airline makes exceptions, but only when life and death are involved. Of course, your ticket is still valid and can be used on a flight to the same destination.

11-32. I'm sorry to tell you, we can't supply the custom decorations you requested. We called every supplier, and none of them can do what you want on such short notice. You can, however, get a standard decorative package on the same theme in time. I found a supplier that stocks these. Of course, it won't have quite the flair you originally requested.

11-33. We can't refund your money for the malfunctioning MP3 player. You shouldn't have immersed the unit in water while swimming; the users' manual clearly states that the unit is not designed to be used in adverse environments.

11-34. **Communication Ethics [LO-4]** The insurance company where you work is planning to raise all premiums for health-care coverage. Your boss has asked you to read a draft of her letter to customers announcing the new, higher rates. The first two paragraphs discuss some exciting medical advances and the expanded coverage offered by your company. Only in the final paragraph do customers learn that they will have to pay more for coverage starting next year. What are the ethical implications of this draft? What changes would you suggest?

11-35. **Sending Negative Organizational News [LO-6]** Public companies occasionally need to issue news releases to announce or explain downturns in sales, profits, demand, or other business factors. Search the web to locate a company that has issued a press release that recently reported lower earnings or other bad news and access the news release on the firm's website. You can also search for press releases at **www.prnewswire.com** or **www.businesswire.com**. How does the headline relate to the main message of the release? Is the release organized according to the direct or the indirect approach? What does the company do to present the bad news in a favorable light—and does this effort seem sincere and ethical to you?

Expand Your Skills

Critique the Professionals

Locate an example online of a negative-news message from any company. Possible examples include announcements of product recalls, poor financial results, layoffs, and fines or other legal troubles. Analyze the approach the company took; was it the most effective strategy possible? Did the company apologize, if doing so would have been appropriate under the circumstances, and does the apology seem sincere? Does the tone of the message match the seriousness of the situation? Does the message end on a positive note, as appropriate? Using whatever medium your instructor requests, write a brief analysis of the message (no more than one page), citing specific elements from the piece and support from the chapter.

Sharpening Your Career Skills Online

Find a website, video, article, podcast, or PowerPoint presentation that offers advice on writing messages that convey negative information. Write a brief email message to your instructor describing the item you found and summarizing the career skills information you learned from it.

Build Your Career

Networking is a lifelong activity that can help you at every stage of your career. Getting started can seem daunting, though—particularly if you haven't entered the workforce full-time yet. Jump ahead to page 522 and read the tips for getting organized, preparing yourself to become a valued networker, and building your network. If you take it one step at a time and gradually build out from the people you already know, before long you'll be connected online and offline with dozens of people.

To get started, create a system for organizing your contacts. You can use a spreadsheet, or you'll find a variety of free or reasonably priced content management apps for both iOS and Android phones. Investigate the features of these apps and take the time to select one that works for you—and that you'll be sure to use. You'll collect a surprising amount of data as you network, and you'll want to keep it organized and usable.

Cases

For all cases, feel free to use your creativity to make up any details you need to craft effective messages.

Negative Messages On Routine Business Matters

EMAIL SKILLS

11-36. Message Strategies: Rejecting Suggestions and Proposals; Communication Ethics: Making Ethical Choices [LO-5] Knowing how much online product reviews can shape consumer behavior, the other cofounder of your company has just circulated an internal email message with the not-so-subtle hint that everyone in your small start-up should pose as happy customers and post glowing reviews of your new product on Amazon and other shopping sites. You're horrified at the idea—not only is this highly unethical, but if (or more likely when) the scheme is exposed, the company's reputation will be severely damaged.

Your task: You would prefer to address this in a private conversation, but because your partner has already pitched the idea to everyone via email, you have no choice but to respond via email as well. You need to act quickly before anyone acts on the suggestion. Write a response explaining why this is a bad idea and telling employees not to do it. Keep in mind that you are chastising your business partner in front of all your employees. Make up any names or other details you need.

MICROBLOGGING SKILLS

11-37. Message Strategies: Making Routine Negative Announcements [LO-5] Professional musicians do everything they can to keep the show going, particularly for tours that are scheduled months in advance. However, illness and other unforeseeable circumstances can force an act to cancel shows, even after all the tickets have been sold.

Your task: Choose one of your favorite musical acts and assume that you are the tour manager who needs to tell 25,000 fans that an upcoming concert must be canceled because of illness. Ticket holders can apply for a refund at the artist's website or keep their tickets for a future concert date, which will be identified and announced as soon as possible. Write two tweets, one announcing the cancellation and one outlining the options for ticket holders. Make up any information you need, and send your tweets to your instructor via email (don't actually tweet them).

EMAIL SKILLS

11-38. Message Strategies: Rejecting Proposals [LO-5] Imagine that you are the president of a student club or some other campus group that is unaffiliated with any larger national or international organization. (It can be any type of organization—recreational, charitable, academic, cultural, professional, or social—but try to use a real organization, even if you aren't a member.) You've just received a message from someone who is the president of a similar club in another

college or university proposing to form a national organizational structure. Her proposal has some appealing aspects, including unified branding and recruiting, the opportunity to share best practices, and the chance to socialize with and learn from like-minded students across the country. However, after talking it over with some of your members, you decide it's not right for you. You believe that the time, trouble, and costs of being part of a national organization would outweigh the benefits it could offer.

Your task: Draft an email response politely declining the offer.

EMAIL SKILLS

11-39. Message Strategies: Rejecting Suggestions and Proposals [LO-5] Walter Joss is one of the best employees in your department, a smart and hard worker with a keen mind for business. His upbeat attitude has helped the entire department get through some recent rough times, and on a personal level, his wise counsel helped you grow into a leadership role when you were promoted to marketing manager several years ago.

You generally welcome Joss's input on the department's operations, and you have implemented several of his ideas to improve the company's marketing efforts. However, the proposal he emailed you yesterday was not his best work, to put it mildly. He proposed that the company dump the advertising agency it has used for a decade and replace it with some new agency you've never heard of. The only reasons he offered were that the agency "had become unresponsive" and that a "smaller agency could meet our needs better." He failed to address any of the other criteria that are used to select advertising agencies, such as costs, creative skills, technical abilities, geographic reach, research capabilities, and media experience.

This is the first you've heard any criticism of the agency, and in fact, their work has helped your company increase sales every year.

Your task: Draft an email message to Joss, rejecting his proposal. (Note that in a real-life setting, you would want to discuss this with Joss in person, rather than through email, but use email for the purposes of this exercise.)

MICROBLOGGING SKILLS

11-40. Message Strategies: Making Routine Negative Announcements [LO-5] JetBlue was one of the first companies to incorporate Twitter into its customer communications, and two million fliers and fans now follow the airline's tweeting staff members. Messages include announcements about fare sales, celebrations of company milestones, schedule updates, and even personalized responses to people who tweet with questions or complaints about the company

Your task: Write a tweet alerting JetBlue customers to the possibility that Hurricane Louie might disrupt flight schedules from August 13 through August 15. Tell them that decisions about delays and cancellations will be made on a city-by-city basis and will be announced on Twitter and the company's website.

EMAIL SKILLS

11-41. Message Strategies: Refusing Claims and Requests for Adjustment [LO-5] Your company, Ballistic, markets a line of rugged mobile phone cases. A customer, Jodi Cozart, has just emailed a claim, requesting that Ballistic replace her phone because the case did not protect it when a rafter fell on it at a construction site. Ballistic's warranty does not cover damage to phones, only defects of material and workmanship in the cases themselves. (You can read the warranty at www.goballisticcase.com/pages/warranty.)

Your task: Write an email response to the customer, denying her request for a new phone.

PODCASTING SKILLS

11-42. Message Strategies: Negative Announcements on Routine Matters [LO-5] An employee concierge seemed like a great idea when you added it as an employee benefit last year. The concierge handles a wide variety of personal chores for employees, everything from dropping off dry cleaning to ordering event tickets to sending flowers. Employees love the service, and you know that the time they save can be devoted to work or family activities. Unfortunately, profits are way down and concierge usage is up—up so far that you'll need to add a second concierge to keep up with the demand. As painful as it will be for everyone, you decide that the company needs to stop offering the service.

Your task: Script a brief podcast announcing the decision and explaining why it is necessary. Make up any details you need. If your instructor asks you to do so, record your podcast and submit the file.

SOCIAL NETWORKING SKILLS

11-43. Message Strategies: Rejecting Suggestions and Proposals [LO-5] All companies love *product enthusiasts*, those customers who are such fans that their activities help the company market its products and support its customers. Enthusiasts of a particular company or product often join *owners groups* or *user groups* to network, share ideas, and support one another. These groups can be sponsored by the company or entirely independent. Social media are a natural forum for product enthusiasts as they meet online to share tips, tricks, rumors about upcoming products, and the pros and cons of various products, as well as provide feedback to the companies that make the products they use and enjoy.

Imagine you're on the social media team for Android, the operating system made by Google that is used in more than a billion mobile devices. With more than 2 million followers and more than 2 billion likes, the Android Facebook page is a popular online destination for Android smartphone and tablet users. After posting an item about some new software features, you get a comment from Shauna Roberts, who has commented on hundreds of posts over the past few years. She is definitely an Android enthusiast and has helped many other users with technical support issues—and helped the Android team with some great product suggestions.

Today she has a proposal for you: She wants Google to start paying the top commenters on the Android Facebook page in return for the work they do to help both customers and the company. Her argument is that Google benefits from the enthusiasts' time and expertise, so it would be fair to offer some modest compensation in return.

Your task: Draft a message that you could post on the company's Facebook page in response to this proposal. The idea has come up before, and the company's response has always been that paying enthusiasts for social media activity, even if it helps the company through word-of-mouth marketing and lower support costs, would be too difficult to manage. First, judging the relative value of thousands of comments would be next to impossible. Second, quantity doesn't necessarily mean quality when it comes to sharing technical information. And third, the administrative and contractual overhead needed to make these work-for-hire relationships legal and legitimate would be overwhelming.[22]

LETTER-WRITING SKILLS

11-44. Message Strategies: Negative Announcements on Routine Matters [LO-5] Your company, PolicyPlan Insurance Services, is a 120-employee insurance claims processor based in Milwaukee. PolicyPlan has engaged Midwest Sparkleen for interior and exterior cleaning for the past five years. Midwest Sparkleen did exemplary work for the first four years, but after a change of ownership last year, the level of service has plummeted. Offices are no longer cleaned thoroughly, you've had to call the company at least six times to remind them to take care of spills and other messes they're supposed to address routinely, and they've left toxic cleaning chemicals in a public hallway on several occasions. You have spoken with the owner about your concerns twice in the past three months, but his assurances that service would improve have not resulted in any noticeable changes. When the evening cleaning crew forgot to lock the lobby door last Thursday—leaving your entire facility vulnerable to theft from midnight until 8:00 Friday morning—you decided it was time for to look for a new service provider.

Your task: Write a letter to Jason Allred, owner of Midwest Sparkleen, 4000 South Howell Avenue, Milwaukee, WI, 53207, telling him that PolicyPlan will not be renewing its annual cleaning contract with Midwest Sparkleen when the current contract expires at the end of this month. Cite the examples identified above, and keep the tone of your letter professional.

LETTER-WRITING SKILLS

11-45. Message Strategies: Negative Announcements on Routine Matters [LO-5] You enjoy helping other people learn, and your part-time work as a tutor for high school students has brought in some much-needed income during the past two years. You pride yourself on giving everything you can to help every one of your clients, but you've reached the end of the line with Drew Whitechapel. You know he has the ability, but he refuses to take tutoring seriously and continues to get failing grades in his American History class. You know he isn't getting much value from your tutoring, and you would rather devote your time and energy to a more serious student.

Your task: Write a letter to Drew's parents explaining that you will no longer be able to tutor him after this month. (They've already paid you for this month's sessions.)

EMAIL SKILLS

11-46. Message Strategies: Handling Bad News About Transactions [LO-6] One of your customer service duties at Bass Pro Shops (**www.basspro.com**) is responding to email inquiries from customers. This morning you received a message from a long-time customer who couldn't find his favorite Orvis brand fly fishing reel on the company's website.

Your task: Write a response to the customer explaining that this particular Orvis model is no longer available. Find another fly reel in the same price range (between $200 and $300) from Orvis or another maker and suggest it as an alternative. You can adapt some of the text from the Bass Pro website, but rephrase it for the more conversational tone expected in an email message.

Negative Organizational News

EMAIL SKILLS

11-47. Message Strategies: Making Routine Negative Announcements [LO-5] You've been proud of many things your gardening tool company has accomplished as it grew from just you working in your basement shop to a nationally known company that employs more than 200 people. However, nothing made you prouder than the company's Helping Our Hometown Grow program, in which employees volunteer on company time to help residents in your city start their own vegetable gardens, using tools donated by the company. Nearly 50 employees participated directly, helping some 500 families supplement their grocery budgets with homegrown produce. Virtually everyone in the company contributed, though, because employees who didn't volunteer to help in the gardens pitched in to cover the work responsibilities of the volunteers.

Sadly, 10 years after you launched the program, you have reached the inescapable conclusion that the company can no longer afford to keep the program going. With consumers around the country still struggling with the aftereffects of a deep recession, sales have been dropping for the past three years—even as lower-cost competitors step up their presence in the market. To save the program, you would have to lay off several employees, but your employees come first.

Your task: Write an email to the entire company, announcing the cancellation of the program.

MICROBLOGGING SKILLS

11-48. Message Strategies: Responding to Rumors [LO-6] Sheila Elliot, a well-known actress, appeared on a national talk show last night and claimed that your company's

Smoothstone cookware was responsible for her toddler's learning disability. Elliot claimed that the nonstick surfaces of Smoothstone pots and pans contain a dangerous chemical that affected her child's cognitive development. There's just one problem with her story—well, three problems, actually: (a) your company's cookware line is called Moonstone, not Smoothstone; (b) Moonstone does not contain and never has contained the chemical Elliot mentioned; and (c) the product she is really thinking of was called Smoothfire, which was made by another company and was pulled off the market five years ago.

Thousands of worried parents aren't waiting for the fact-checkers, however. They took to the blogosphere and Twittersphere with a vengeance overnight, warning people to throw away anything made by your company (Tatum Housewares). Several television stations have already picked up the Twitter chatter and repeated the rumor. Retailers are already calling your sales staff to cancel orders.

Your task: Write a three-message sequence to be posted on your company's Twitter account, correcting the rumor and conveying the three points outlined above.

BLOGGING SKILLS

11-49. Message Strategies: Negative Organizational Announcements [LO-6] XtremityPlus is known for its outlandish extreme-sports products, and the Looney Launch is no exception. Fulfilling the dream of every childhood daredevil, the Looney Launch is an aluminum and fiberglass design that quickly unfolds to create the ultimate bicycle jump. The product has been selling as fast as you can make it, even though it is covered with warning labels proclaiming that its use is inherently dangerous.

As XtremityPlus's CEO, you were nervous about introducing this product, and your fears were just confirmed: You've been notified of the first lawsuit by a parent whose child broke several bones after crash-landing off a Looney Launch.

Your task: Write a post for your internal blog explaining that the Looney Launch is being removed from the market immediately. Tell your employees to expect some negative reactions from enthusiastic customers and retailers, but explain that (a) the company can't afford the risk of additional lawsuits and (b) even for XtremityPlus, the Looney Launch went one step too far. The product is simply too dangerous to sell in good conscience.

SOCIAL NETWORKING SKILLS/PORTFOLIO BUILDER

11-50. Message Strategies: Communicating in a Crisis [LO-6] When a product is found to be unsafe to use, it can be *recalled* to address the problem. Most recalls are *voluntary*, meaning the company initiates the action after being alerted by consumers, safety experts, its own internal testing, or government agencies. In addition, the U.S. Food and Drug Administration, the U.S. Department of Agriculture, and the U.S. Consumer Product Safety Commission have the authority to issue *mandatory* recalls if they determine there is an immediate and widespread risk to consumer health or safety or if a company doesn't respond to the agency's instructions to issue a voluntary recall. The nature of a recall action varies by the type of product and the danger it presents. In some instances, consumers are instructed to dispose of or return the product and get a refund or replacement; in others (such as with automobiles), they are instructed to arrange to have the product repaired.[23]

Your task: Visit www.cpsc.gov/recalls and research a product that has been recently recalled for a significant safety reason. Now imagine that you are the company's social media manager, tasked with alerting consumers about the recall. Draft a statement for the company's Facebook page (roughly 100 to 150 words), describing the problem and instructing customers what to do next.

BLOGGING SKILLS

11-51. Message Strategies: Responding to Rumors and Public Criticism [LO-6] Spreading *FUD*—fear, uncertainty, and doubt—about other companies is one of the less-honorable ways of dealing with competition in the business world. For example, someone can start a "whisper campaign" in the marketplace, raising fears that a particular company is struggling financially. Customers who don't want to risk future instability in their supply chains might then shift their purchasing away from the company based on nothing more than the false rumor.

Your task: Find the website of any company that seems interesting. Imagine you are the CEO and the company is the subject of an online rumor about impending bankruptcy. Explore the website to get a basic feel for what the company does. Making up any information you need, write a post for the company's blog explaining that the bankruptcy rumors are false and that the company is on solid financial ground and plans to keep serving the industry for many years to come. (Be sure to review page 324 for tips.)

SOCIAL NETWORKING SKILLS

11-52. Message Strategies: Responding to Rumors and Public Criticism [LO-6] The consumer reviews on Yelp can be a promotional boon to any local business—provided the reviews are positive, of course. Negative reviews, fair or not, can affect a company's reputation and drive away potential customers. Fortunately for business owners, sites like Yelp give them the means to respond to reviews, whether they want to apologize for poor service, offer some form of compensation, or correct misinformation in a review.

Your task: Search Yelp for a negative review (one or two stars) on any business in any city. Find a review that has some substance to it, not just a simple, angry rant. Now imagine you are the owner of that business, and write a reply that could be posted via the "Add Owner Comment" feature. Use information you find on Yelp about the company and fill in any details by using your imagination. Remember that your comment will be visible to everyone who visits Yelp. (Be sure to review page 324 for tips.)

Negative Employment Messages

SOCIAL NETWORKING SKILLS/EMAIL SKILLS

11-53. Message Strategies: Refusing Requests for Recommendations [LO-7] You're delighted to get a message from an old friend and colleague, Heather Lang. You're delighted right up to the moment you read her request that you write a LinkedIn recommendation about her web design and programming skills. You would do just about anything for Lang—anything except recommend her web design skills. She is a master programmer whose technical wizardry saved more client projects than you can count, but when it comes to artistic design, Lang simply doesn't have "it." From gaudy color schemes to unreadable type treatment to confusing layouts, her design sense is as weak as her technical acumen is strong.

Your task: First, write a brief email to Lang explaining that you would be most comfortable highlighting her technical skills because that is where you believe her true strengths lie. Second, write a two-sentence recommendation that you would be willing to share on LinkedIn, recommending Lang's technical skills. Make up or research any details you need.

EMAIL SKILLS

11-54. Message Strategies: Rejecting Job Applicants [LO-7] You manage the Kohl's department store in Sparks, Nevada, and you are currently interviewing candidates for an area supervisor position. One of the candidates is a sales associate who has a promising future but only three months of retail experience.

Your task: Write a brief email to Dan Foster thanking him for applying but letting him know that he was not chosen for the position. He is an internal candidate, so it is appropriate to let him know why. Make up any details you need to write a realistic message.

EMAIL SKILLS

11-55. Message Strategies: Refusing Requests for Recommendations [LO-5] Well, this is awkward. Daniel Sturgis, who quit last year just as you were planning to fire him for consistently failing to meet agreed-on performance targets, has just emailed you from his new job, asking for a recommendation. He says his new job is awful and he regrets leaving your company. He knows you don't have any openings, but he would be grateful for a recommendation.

Your task: Write an email message to Sturgis, explaining that you will not be able to write him a recommendation. Make up any details you need.

MESSAGING SKILLS/MOBILE SKILLS

11-56. Message Strategies: Refusing Requests for Recommendations [LO-5] Your classmates could end up being important business contacts as you all progress through your careers. Of course, this also means you might be asked for favors that you're not comfortable giving, such as providing recommendations for someone whose skills or other attributes you don't admire. Choose a person who was in a course you recently took and imagine that a few years after graduation he or she texts you with a request for a job recommendation letter. You've kept in touch socially, at least online, and would like to continue to do so, but your memory of this person's professional potential is more negative than positive. (Make up any combination of negative traits, such as failing to contribute to team projects, giving up quickly in the face of adversity, struggling to understand basic concepts, or other limitations.)

Your task: You've decided to decline the request, so now you must figure out how to phrase your response. Draft a message that you could send in this scenario, making up any information you need. Don't use the person's real name, and don't include any information that your instructor or anyone else could use to identify the person, but imagine that you are in fact writing to this individual. You're on a compatible mobile service that doesn't limit the length of text messages, but remember that your message will be read on a small mobile screen. Email your response to your instructor.

MEMO-WRITING SKILLS/PORTFOLIO BUILDER

11-57. Message Strategies: Negative Performance Reviews [LO-7] Elaine Bridgewater, the former professional golfer you hired to oversee your golf equipment company's relationship with retailers, knows the business inside and out. As a former touring pro, she has unmatched credibility. She also has seemingly boundless energy, solid technical knowledge, and an engaging personal style. Unfortunately, she hasn't been quite as attentive as she needs to be when it comes to communicating with retailers. You've been getting complaints about voice-mail messages going unanswered for days, confusing emails that require two or three rounds of clarification, and reports that are haphazardly thrown together. As valuable as Bridgewater's other skills are, she's going to cost the company sales if this goes on much longer. The retail channel is vital to your company's survival, and she's the employee most involved in this channel.

Your task: Draft a brief (one-page maximum) informal performance appraisal and improvement plan for Bridgewater. Be sure to compliment her on the areas in which she excels but don't shy away from highlighting the areas in which she needs to improve: punctual response to customer messages; clear writing; and careful revision, production, and proofreading. Use what you've learned in this course so far to supply any additional advice about the importance of these skills.

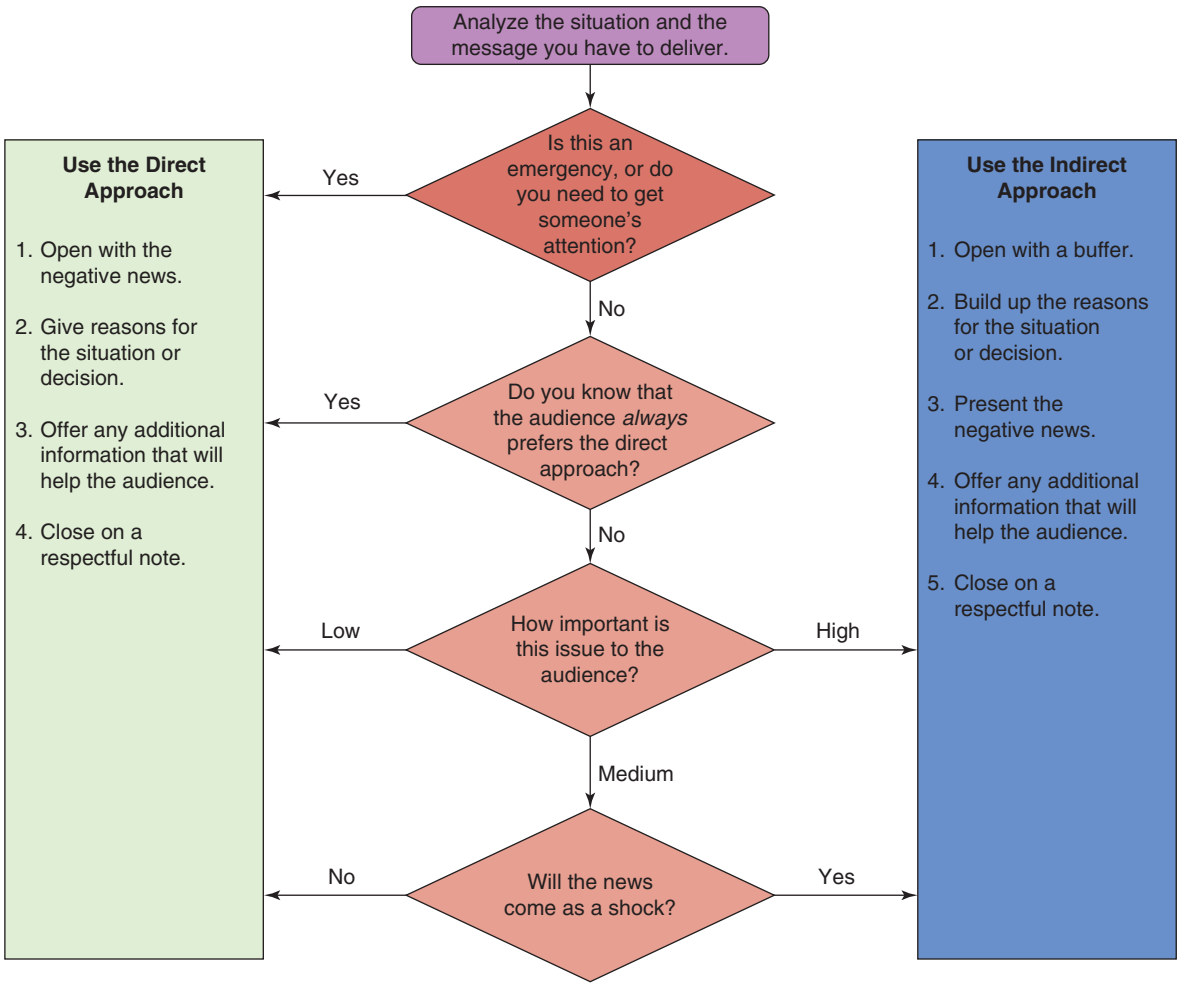
Five-Minute Guide to Writing Negative Messages

Whenever you need to send a difficult message, review these tips; then keep this guide at your side while you revise, edit, and proofread.

00:01

Choose the direct or indirect approach

Following this decision tree will help you decide whether the direct or indirect approach is better in a given situation. Of course, use your best judgment as well. Your relationship with the audience could affect your choice of approaches, for example.



00:02

Think about the blocks of information you'll need for either approach

Low Emotional Involvement → Direct Approach

Specific purpose: To inform employees that the free coffee stations on each floor are being removed to save money

I. Announce that the coffee stations are being removed. — **The bad news**

II. Explain that the change is part of an effort to help the company avoid temporary salary reductions during the slow economy. — **Reasoning**

III. Explain that coffee and fruit will be available for purchase throughout the day in the employee cafeteria on the first floor. — **Additional info**

IV. Mention—in an upbeat way—that the walk up and down the stairs will help employees reenergize when they need a break. — **Positive angle**

V. Explain that the management team will review profit levels quarter by quarter to see if the coffee stations can be put back. — **Additional info**

VI. Thank everyone for their continued efforts to boost sales and cut costs; with our combined efforts we will get through this slow period and return to solid growth as soon as possible. — **Respectful close**

High Emotional Involvement → Indirect Approach

Specific purpose: To inform employees that the Triton project, one of the new products currently in development, is being canceled

I. Remind employees of the company's strategy of periodically reviewing cost and revenue projections for every new product under development. — **Buffer**

II. Describe recent increases in material costs that will affect the manufacturing costs of all the company's products. — **Reasoning**

III. Describe the recent entry into the market of a new competitor whose prices significantly undercut the projected retail price of the Triton product. — **Reasoning**

IV. Explain that between these forces, the Triton project no longer looks like a profitable product for the company to pursue. — **The bad news**

V. Announce that the project is being canceled, effective immediately.

VI. Explain that management is currently deciding where to redeploy the Triton staff; their jobs are safe. — **Positive angle**

VII. Thank all the employees on the Triton team for their commitment and effort; emphasize the strong prospects for the company's other new products. — **Respectful close**

00:03

Think about your opening

1. With the direct approach, you open with the bad news or negative information; however, a few words of "socializing" can help you ease into the message.
2. With the indirect approach, you open with a buffer, which must be written carefully to avoid being misleading or disrespectful:
   - Remember that the purposes of a buffer are to ease the reader into the message by establishing common ground and to create space for a transition into the reasoning and evidence that you are going to lay out next.
   - The buffer must never mislead the reader into thinking good news is about to follow.

00:04

Maintain high standards of ethics and etiquette

1. Be aware of any laws or regulations that might dictate the content and delivery of the message.
2. Remember that negative messages can have a significant negative impact on your readers.
3. Take care to manage your own emotions and consider the emotional state of your audience.

00:05

Adjust as needed for the specific situation

1. What expectations have been set in the past?
2. What is the nature of your relationship with the reader and how do you want to maintain it?
3. What's the most sensitive combination of medium and channel for this message?

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12 Writing Persuasive Messages

LEARNING OBJECTIVES

After studying this chapter, you will be able to

1. Apply the three-step writing process to persuasive messages.
2. Describe an effective strategy for developing persuasive business messages, and identify the three most common categories of persuasive business messages.
3. Describe an effective strategy for developing marketing and sales messages, and explain how to modify your approach when writing promotional messages for social media.
4. Identify steps you can take to avoid ethical lapses in marketing and sales messages.



Bloomberg/Getty Images

Stitch Fix cofounder and CEO Katrina Lake relied heavily on persuasive communication skills to secure funding and attract top talent to her start-up company.

COMMUNICATION CLOSE-UP AT Stitch Fix

www.stitchfix.com

Katrina Lake's path to entrepreneurship didn't start with the stereotypical urge to create a company. In fact, she kept waiting for someone else to create the company she had in mind so she could buy from it and invest in it. During the first two phases of her career, in a retail consulting firm and then a venture capital firm, she kept looking for someone to solve what she believed was the central problem of online fashion retailing: "How can we marry the ease of shopping online with what people want in clothes, which is really about fit and style?"

After waiting for someone else to pitch the right idea to her in the hopes of getting investment capital, she decided to launch it herself. She went back to school to pursue an MBA at Harvard, where her idea began to take real shape and Stitch Fix was born. The concept was a clothing retailer that would combine the convenience of online shopping with the individual touch of the stylists and personal shoppers available in higher-end shops and department stores. Customers could receive a small selection of items chosen by a personal stylist (with the help of some powerful artificial intelligence) and then buy what they like and send back what they don't.

Lake believed in the idea from the outset, but the need to persuade others to believe in it began early and has been an evolving challenge ever since. At Harvard, for instance, her professors pointed out the mammoth inventory-management challenge that the send-and-return model would create. Later, when she was pitching the company to investors from the other side of the table, she had to convince mostly older, mostly male venture capitalists that this was a viable business model because it addressed an unmet need among a mostly younger, female audience.

However, enough people began to believe. Sales took off as more and more women responded to the idea of getting personalized style advice and the convenience of new wardrobe pieces shipped to their front door. Just as important, some major-league talent from across the retailing sector began to believe in her vision, too. High-ranking executives from Netflix, Nike, Walmart, and Salesforce.com signed on, each bringing specific areas of expertise needed to scale up Lake's vision, from inventory management to merchandising to AI and data analytics. The AI component is crucial because it extends the reach of the stylists by continually identifying new clothing choices that customers are most likely to enjoy.

Investors climbed on board, too, when more of them grasped the unmet need that Stitch Fix is filling and appreciated Lake's vision and leadership. The company quickly reached $1 billion in annual revenues and now has more than 2 million active customers.

So far, so good, but the need for compelling persuasive communication never ends, only evolves. The next step is to move beyond the earlier enthusiasts and continue to expand the customer base with people who might be reluctant to try this new mode of shopping. The company knows that these customers will be more expensive to acquire, and it will have to do so in the face of new competitors and the omnipresent threat of Amazon. If any company can succeed with this business model over the long term, though, it's likely to be Lake and the team she has assembled.[1]

Using the Three-Step Writing Process for Persuasive Messages

1 LEARNING OBJECTIVE
Apply the three-step writing process to persuasive messages.

Persuasion is the attempt to change someone's attitudes, beliefs, or actions.

Katrina Lake (profiled in the chapter-opening Communication Close-Up) understands that successful businesses rely on persuasive messages in both internal and external communication. Whether you're trying to convince your boss to open a new office in Europe or encourage potential customers to try an online styling service, you need to call on your abilities of **persuasion**—the attempt to change an audience's attitudes, beliefs, or actions.[2] Because persuasive messages ask audiences to give something of value (money in exchange for a product, for example) or to take substantial action (such as changing a corporate policy), they are more challenging to write than routine messages. Successful professionals understand that persuasion is not about trickery or getting people to act against their own best interests; it's about letting audiences know they have choices and presenting your offering in the best possible light.[3]

Check out the "Five-Minute Guide to Writing Persuasive Messages" at the end of the chapter.

You will encounter many business communication situations in which your goal is to influence the attitudes, actions, or beliefs of other people. Common examples of persuasive messages include asking colleagues to take action, asking managers to provide resources, asking investors to provide funding for a growing company, and asking potential customers to buy goods and services.

Persuasion may seem like a specialized skill that is required only by salespeople or marketing specialists, but virtually all business professionals can benefit from knowing how to apply persuasive techniques in their communication efforts. The good news is that you are probably already more persuasive than you think you are. In fact, one of the biggest mistakes made in persuasive communication is not even trying. Too often, people think they don't have the skills required or aren't in a position to propose new ideas.[4]

Fortunately, the techniques of effective persuasion are simple to learn and easy to use, as long as you start from the audience's point of view. Ethical persuasion never attempts to coerce or trick people into acting against their own best interests. The secret is to demonstrate in a compelling way how your interests align with your audience's interests.

STEP 1: PLANNING PERSUASIVE MESSAGES

Having a great idea or a great product is not enough; you need to be able to convince others of its merits.

In today's information-saturated business environment, having a great idea or a great product is no longer enough. Every day, untold numbers of good ideas go unnoticed and good products go unsold simply because the messages meant to promote them aren't compelling enough to be heard above the competitive noise. Creating successful persuasive messages in these challenging situations demands careful attention to all four tasks in the planning step, starting with an insightful analysis of your purpose and your audience.

Analyzing the Situation

Clarifying your purpose is an essential step with persuasive messages; make sure you really know how you would like your audience to respond.

In defining your purpose, make sure you're clear about what you really hope to achieve. Suppose you want to persuade company executives to support a research project. But what does "support" mean? Do you want them to pat you on the back and wish you well? Or do you want them to give you a staff of five researchers and a $1 million annual budget?

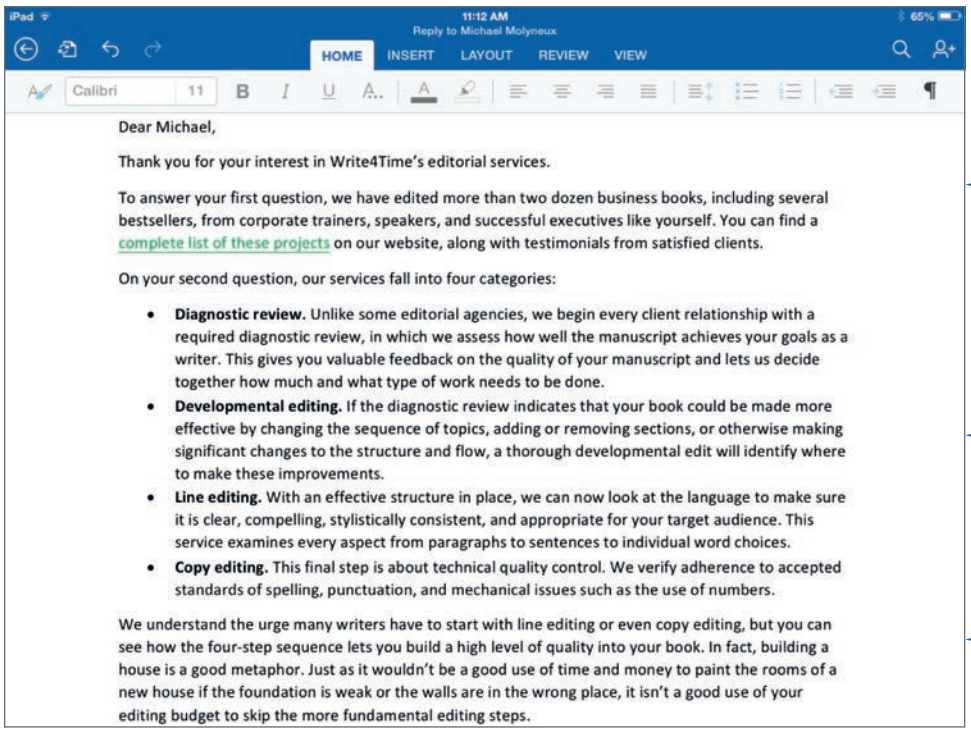


Figure 12.1 Appealing to Audience Needs
This draft of a response to an inquiry about an editorial services company's offerings addresses the writer's concerns about the time, cost, and effectiveness of the company's services.

In every persuasive message, you're asking for something that is important to you, but keep in mind that the most effective persuasive messages are closely connected to the things that are important to your audience[5] (see Figure 12.1). Whether you're writing a proposal to your manager or a sales letter to a potential customer, start by imagining yourself in that person's position and identify the issues or opportunities they are likely to already be thinking about.[6] For example, what problems or challenges are keeping your boss awake at night? If your persuasive message holds the promise of reducing those worries, you stand a much better chance of being successful than if your proposal is unrelated to the issues that are important to your boss (or, worse yet, has the potential to make his or her life even more complicated).

To understand and categorize audience needs, you can refer to specific information, such as **demographics** (the age, gender, occupation, income, education, and other quantifiable characteristics of the people you're trying to persuade) and **psychographics** (personality, attitudes, lifestyle, and other psychological characteristics). When analyzing your audiences, take into account their cultural expectations and practices so that you don't undermine your persuasive message by using an inappropriate appeal or by presenting your message in a way that seems unfamiliar or uncomfortable to your readers.

Demographics include characteristics such as age, gender, occupation, income, and education.

Psychographics include characteristics such as personality, attitudes, and lifestyle.

If you aim to change someone's attitudes, beliefs, or actions, it is vital to understand his or her **motivation**—the combination of forces that drive people to satisfy their needs. Table 12.1 on the next page lists some of the needs that psychologists have identified or suggested as being important in influencing human motivation. Obviously, the more closely a persuasive message aligns with a recipient's existing motivation, the more effective the message is likely to be. For example, if you try to persuade consumers to purchase a product based on its trendy fashion appeal, that message will connect with consumers who are motivated by a desire to be in fashion, but it probably won't connect with consumers driven more by functional or financial concerns.

Motivation is the combination of forces that drive people to satisfy their needs.

Gathering Information

Once your situation analysis is complete, you need to gather the information necessary to create a compelling persuasive message. You'll learn more about the types of information

TABLE 12.1 Human Needs That Influence Motivation

Need	Implications for Communication
Basic physiological requirements: The needs for food, water, sleep, oxygen, and other essentials	Everyone has these needs, but the degree of attention an individual gives to them often depends on whether the needs are being met; for instance, an advertisement for sleeping pills will have greater appeal to someone suffering from insomnia than to someone who has no problem sleeping.
Safety and security: The needs for protection from bodily harm, for the safety of loved ones, and for financial security, protection of personal identity, career security, and other assurances	These needs influence both consumer and business decisions in a wide variety of ways; for instance, advertisements for life insurance often encourage parents to think about the financial security of their children and other loved ones.
Affiliation and belonging: The needs for companionship, acceptance, love, popularity, and approval	The need to feel loved, accepted, or popular drives a great deal of human behavior, from the desire to be attractive to potential mates to wearing the clothing style that a particular social group is likely to approve.
Power and control: The need to feel in control of situations or to exert authority over others	You can see many examples appealing to this need in advertisements: *Take control of your life, your finances, your future, your career*, and so on. Many people who lack power want to know how to get it, and people who have power often want others to know they have it.
Achievement: The need to feel a sense of accomplishment—or to be admired by others for accomplishments	This need can involve both *knowing* (when people experience a feeling of accomplishment) and *showing* (when people are able to show others that they've achieved success); advertising for luxury consumer products frequently appeals to this need.
Adventure and distraction: The need for excitement or relief from daily routine	People vary widely in their need for adventure; some crave excitement—even danger—whereas others value calmness and predictability. Some needs for adventure and distraction are met *virtually*, such as through horror movies, thriller novels, and so on.
Knowledge, exploration, and understanding: The need to keep learning	For some people, learning is usually a means to an end, a way to fulfill some other need; for others, acquiring new knowledge is the goal.
Aesthetic appreciation: The desire to experience beauty, order, symmetry, and so on	Although this need may seem "noncommercial" at first glance, advertisers appeal to it frequently, from the pleasing shape of a package to the quality of the gemstones in a piece of jewelry.
Self-actualization: The need to reach one's full potential as a human being	Psychologists Kurt Goldstein and Abraham Maslow popularized self-actualization as the desire to make the most of one's potential, and Maslow identified it as one of the higher-level needs in his classic hierarchy; even if people met most or all their other needs, they would still feel the need to self-actualize. An often-quoted example of appealing to this need is the U.S. Army's onetime advertising slogan "Be all that you can be."
Helping others: The need to believe that one is making a difference in the lives of other people	This need is the central motivation in fundraising messages and other appeals to charity.

Sources: Courtland L. Bovée and John V. Thill, *Business in Action*, 9th ed. (Upper Saddle River, N.J.: Prentice Hall, 2020), 251–264; based on Saundra K. Ciccarelli and J. Noland White, *Psychology*, 5th ed. (Upper Saddle River, N.J.: Prentice Hall, 2016), 356–363; based on Abraham H. Maslow, "A Theory of Human Motivation," *Psychological Review* 50 (1943): 370–396.

to include in persuasive business messages and marketing and sales messages later in the chapter. Chapter 13 presents advice on how to find the information you need.

Selecting the Right Combination of Medium and Channel

Media and channel choices are always important, of course, but these decisions are particularly sensitive with persuasive messages because such messages are often unexpected and sometimes even unwelcome. The more you understand and respect your audience's habits and preferences, the better your chances of getting past the various physical, digital, and perceptual filters that people use to protect themselves from the daily barrage of promotional messages.

Social media provide some effective options for persuasive messages, particularly marketing and sales messages. However, as "Writing Promotional Messages for Social Media" on page 358 explains, messages in these media require a unique approach.

Organizing Your Information

Effective persuasive messages always emphasize the recipient's needs over the sender's.

For persuasive business messages, the choice of approach is influenced by your position (or authority within the organization) relative to your audience's.

The most effective main ideas for persuasive messages have one thing in common: They are about the receiver, not the sender. For instance, if you're trying to convince others to join you in a business venture, explain how it will help them, not how it will help you.

Limiting your scope is vital. If you seem to be wrestling with more than one main idea or a main idea that has lots of moving parts, chances are you haven't identified your readers' most important concerns. If you try to craft a persuasive message without focusing on the one central problem or opportunity your audience truly cares about, you're unlikely to persuade successfully.[7]

The nature of persuasion is to convince people to change their attitudes, beliefs, or actions, so most persuasive messages use the indirect approach to build up to the moment when you make the request. The indirect approach lets you explain your reasons and build interest before asking for a decision or for action—or perhaps even before revealing your purpose. However, in some instances, such as when you have a close relationship with your audience and the message is welcome or at least neutral, the direct approach can be effective.

For persuasive business messages, the choice between the direct and indirect approaches is also influenced by the extent of your authority, expertise, or power in an organization. For example, if you are a highly regarded technical expert with years of experience, you might use the direct approach in a message to top executives. In contrast, if you don't have "expertise authority" and therefore need to rely more on the strength of your message than the power of your reputation, the indirect approach will probably be more successful.

MOBILE APP
Want to persuade your local government to address a problem? The **City Sourced** app aims to facilitate civic engagement through mobile communication.

STEP 2: WRITING PERSUASIVE MESSAGES

Encourage a positive response to your persuasive messages by (1) using positive and polite language, (2) understanding and respecting cultural differences, (3) being sensitive to organizational cultures, and (4) taking steps to establish your credibility.

Encourage a positive response by
- Using positive and polite language
- Understanding and respecting cultural differences
- Being sensitive to organizational cultures
- Establishing your credibility

Positive language usually happens naturally with persuasive messages because you're promoting an idea, a plan, or a product you believe in. However, take care not to inadvertently insult your readers by implying that they've made poor choices in the past and that you're here to save them from their misguided ways.

Be sure to understand cultural expectations as well. For example, a message that seems forthright and direct in a low-context culture might seem brash and intrusive in a high-context culture.

Just as social culture affects the success of a persuasive message, so too does the culture within an organization. For instance, some organizations handle disagreement and conflict in an indirect, behind-the-scenes way, whereas others accept and even encourage open discussion and the exchange of different viewpoints.

Organizational culture can influence persuasion as much as social culture.

Finally, if you are trying to persuade a skeptical or hostile audience, you must convince them you know what you're talking about and that you're not trying to mislead them. Use these techniques:

- Use straightforward language to avoid suspicions of fantastic claims and emotional manipulation.
- Provide objective evidence for the claims and promises you make.
- Identify your sources, especially if your audience already respects those sources.
- Establish common ground by emphasizing beliefs, attitudes, and background experiences you have in common with the audience.
- Be objective and present fair and logical arguments.
- Show that you respect your audience's values and priorities.
- Persuade with logic, evidence, and compelling narratives rather than trying to coerce with high-pressure, "hard-sell" tactics.
- Whenever possible, try to build your credibility before you present a major proposal or ask for a major decision. That way, audiences don't have to evaluate both you and your message at the same time.[8]

Audiences often respond unfavorably to over-the-top language, so keep your writing simple and straightforward.

STEP 3: COMPLETING PERSUASIVE MESSAGES

Professional writers who specialize in persuasive messages know how vital the details are, so they're careful not to skimp on this part of the writing process. When evaluating your content, try to judge your argument objectively and not overestimate your credibility. When revising for clarity and conciseness, carefully match the purpose and organization to audience needs. If possible, ask an experienced colleague who knows your audience well to review your draft. Your design elements must complement, not detract from, your argument. In addition, meticulous proofreading will identify any mechanical or spelling errors that would weaken your persuasive potential. Finally, make sure your distribution methods fit your audience's expectations and your purpose.

Careless production undermines your credibility, so revise and proofread with care.

With the three-step model in mind, you're ready to begin composing persuasive messages, starting with *persuasive business messages* (those that try to convince audiences to approve new projects, enter into business partnerships, and so on), followed by *marketing and sales messages* (those that try to convince audiences to consider and then purchase products and services).

Developing Persuasive Business Messages

2 LEARNING OBJECTIVE
Describe an effective strategy for developing persuasive business messages, and identify the three most common categories of persuasive business messages.

Your success as a businessperson is closely tied to your ability to encourage others to accept new ideas, change old habits, or act on your recommendations. Unless your career takes you into marketing and sales, most of your persuasive messages will consist of *persuasive business messages*, which are those designed to elicit a preferred response in a nonsales situation.

STRATEGIES FOR PERSUASIVE BUSINESS MESSAGES

Even if you have the power to compel others to do what you want them to do, persuading them is more effective than forcing them. People who are coerced into accepting a decision or plan are less motivated to support it and more likely to react negatively than if they're persuaded.[9] Within the context of the three-step process, effective persuasion involves four essential strategies: framing your arguments, balancing the three types of persuasive appeals, reinforcing your position, and anticipating objections. (Note that all the concepts in this section apply as well to marketing and sales messages, covered later in the chapter.)

Framing Your Arguments

The AIDA model is a useful approach for many persuasive messages:
- Attention
- Interest
- Desire
- Action

As noted previously, most persuasive messages use the indirect approach. Promotional writers often use an indirect plan called the **AIDA model**, which organizes messages into four phases (see Figure 12.2):

- **Attention.** Your first objective is to encourage your audience to want to hear about your problem, idea, or new product—whatever your main idea is. Be sure to find some common ground on which to build your case.

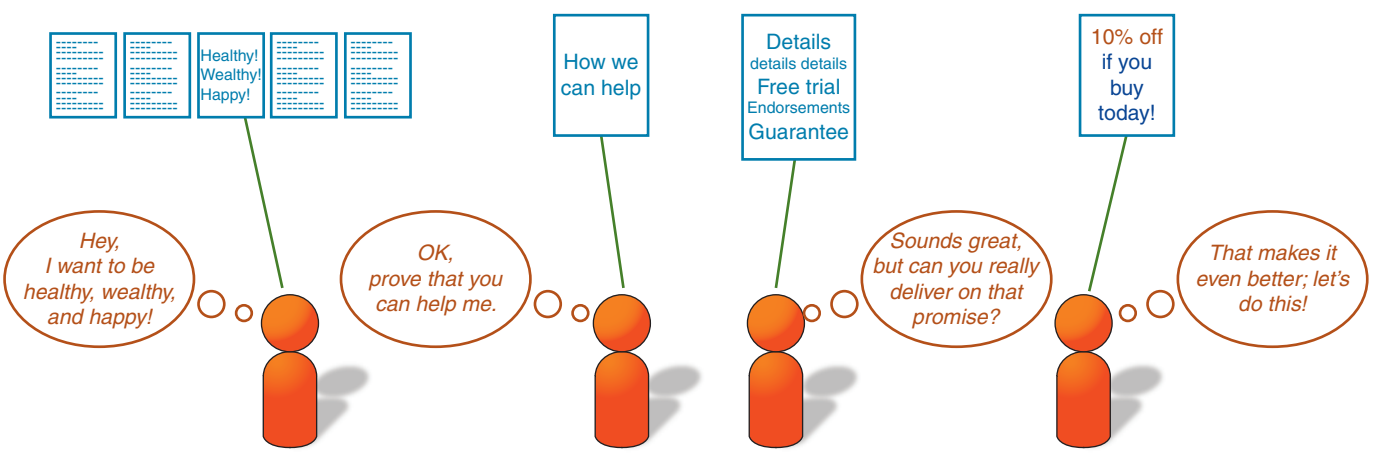


Figure 12.2 The AIDA Model for Persuasive Messages
With the AIDA model, you craft one or more messages to move recipients through the four stages of attention, interest, desire, and action. The model works well for both persuasive business messages (such as persuading your manager to fund a new project) and marketing and sales messages.

- **Interest.** Provide additional details that prompt audience members to imagine how the solution might benefit them.
- **Desire.** Help audience members embrace your idea by explaining how the change will benefit them and answering potential objections.
- **Action.** Suggest the specific action you want your audience to take. Include a deadline, when applicable.

The AIDA model is ideal for the indirect approach.

The AIDA model is tailor-made for using the indirect approach, allowing you to save your main idea for the action phase. However, it can also work with the direct approach, in which case you use your main idea as an attention-getter, build interest with your argument, create desire with your evidence, and emphasize your main idea in the action phase with the specific action you want your audience to take.

When your AIDA message uses the indirect approach and is delivered by email, keep in mind that your subject line usually catches your reader's eye first. Your challenge is to make it interesting and relevant enough to capture reader attention without revealing your main idea. If you put your request in the subject line, you're likely to get a quick "no" before you've had a chance to present your arguments:

Instead of This	Write This
Request for development budget to add automated IM response system	Reducing the cost of customer support inquiries

The AIDA approach has limitations:
- It essentially talks *at* audiences, not *with* them
- It focuses on onetime events, not long-term relationships

With either the direct or indirect approach, AIDA and similar models do have limitations. First, AIDA is a unidirectional method that essentially talks *at* audiences, not *with* them. Second, AIDA is built around a single event, such as asking an audience for a decision, rather than on building a mutually beneficial, long-term relationship.[10] AIDA is still a valuable tool for the right purposes, but as you'll read later in the chapter, a conversational approach is more compatible with today's social media.

Balancing the Three Types of Persuasive Appeals

Persuasive communication is based on three types of appeals:
- *Ethos*—the ethical dimension, particularly your credibility as the writer
- *Pathos*—appeals to emotion
- *Logos*—argumentation based on logic and evidence

Persuasive communication is based on three types of appeals: *ethos* (the ethical dimension, particularly your credibility as the writer), *pathos* (appeals to emotion), and *logos* (argumentation based on logic and evidence). These are powerful tools that can benefit senders and receivers alike if they are used wisely and ethically.[11]

The ethos element of persuasion depends on how much trust your readers or listeners have in your expertise, character, and reliability. Chapter 5 also discusses the vital step of establishing your credibility as part of the three-step writing process.

Within the message itself, you have the task of balancing emotional and logical appeals. Few persuasive appeals are purely logical or purely emotional, and it's important to find the right balance for each message (see Figure 12.3 on the next page). Many marketing and sales messages rely heavily on emotional appeals, but most persuasive business messages rely more on logic. However, even a predominantly emotional message needs to make logical sense at some level, and logical business messages can often be strengthened with the judicious use of emotion.

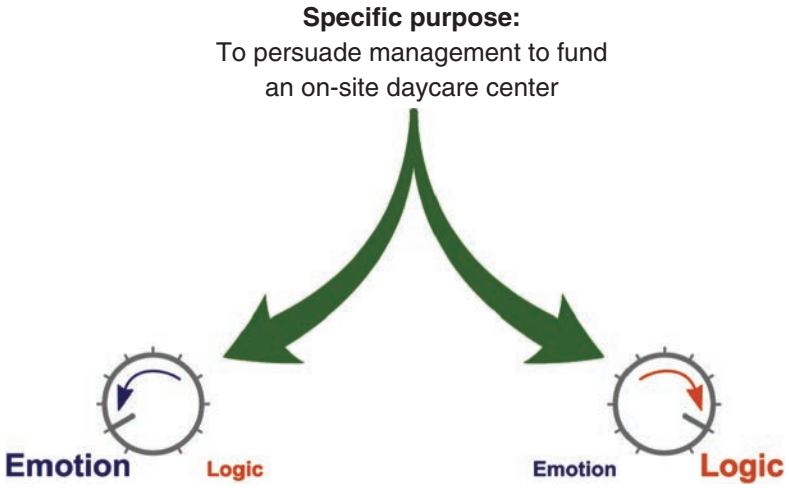
An *emotional appeal* calls on audience feelings or sympathies.

An **emotional appeal** calls on feelings or audience sympathies. For instance, you can make use of the emotions inspired by words such as *freedom, success, prestige, compassion, free*, and *comfort*. Such words put your audience in a certain frame of mind and help them accept your message.

Logical appeals are based on the reader's notions of reason; these appeals can use induction, deduction, or analogy.

A **logical appeal** involves the use of reason and factual evidence. Three common modes of logical persuasion are induction, deduction, and analogy:

- **Induction.** With inductive reasoning, you work from specific evidence to a general conclusion that you can then apply to the situation at hand. To convince your company to adopt a new production process, you could collect specific evidence showing how every company that has adopted it so far has seen increased profits and from there reach the general conclusion that the new process is likely to benefit any company that implements it.



Proposal to improve employee satisfaction and work–life balance

Being separated during the day is stressful for both parents and children.

Many parents are now working more hours and second jobs to make ends meet, so the situation is getting worse.

The extra travel time every morning and evening to put children in day care adds to the stress and cost of coming to work.

When parents need to leave work to pick up sick children from day care or stay home with them, this often creates an unfair burden on other employees to pick up the slack.

Knowing that the company cares about them and their children would boost employee morale.

Therefore, the company should provide an on-site daycare facility with a separate infirmary where sick children could stay during the day.

Proposal to boost productivity and reduce absenteeism

Analysis of employee time records shows that employees with children under the age of 10 take unscheduled days off three times more often than employees without young children.

Daycare issues are cited as the number one reason for these unscheduled days off.

In the 98 exit interviews conducted last year, 24 departing employees mentioned the need to balance family and work commitments as the primary reason for leaving.

In the last six months, HR has logged 14 complaints from employees who say they have to take on extra work when colleagues leave the office to pick up sick children from day care.

Research shows that on-site day care can improve productivity by as much as 20 percent—among parents and nonparents alike.

Therefore, the company should provide an on-site daycare facility with a separate infirmary where sick children could stay during the day.

Figure 12.3 Balancing Logical and Emotional Appeals
Whenever you plan a persuasive message, imagine you have a knob that turns from *emotion* at one extreme to *logic* at the other, letting you adjust the relative proportions of each type of appeal. Compare these two outlines for a proposal that asks management to fund an on-site daycare center. The version on the left relies heavily on emotional appeals, whereas the version on the right uses logical appeals (inductive reasoning, specifically). Through your choice of words, images, and supporting details, you can adjust the emotional-logical ratio in every message.

- **Deduction.** With deductive reasoning, you work from a general theory or hypothesis to a specific conclusion. A generalization could be that dissatisfied customers tend not to buy from the same companies in the future, which proceeds to the specific conclusion that your company should take steps to improve customer satisfaction before it starts losing business.
- **Analogy.** With analogy, you reason from specific evidence to specific evidence, in effect "borrowing" from something familiar to explain something unfamiliar. To persuade management to launch an internal social network, you could argue that the

network would be an online version of the coffee machine or water cooler, places were employees currently meet and exchange information and ideas.

Using logical appeals carries with it the ethical responsibility to avoid faulty logic.

Every method of reasoning is vulnerable to misuse—both intentional and unintentional. Logical errors, commonly known as *logical fallacies*, result from misleading readers via faulty language or misusing reasoning tools such as induction and analogy. Here are some of the more common logical fallacies that you need to avoid in persuasive communication:[12]

- **Hasty or sweeping generalizations.** A hasty generalization occurs when you jump to a generalization without enough evidence to support it. A sweeping generalization ignores exceptions or contradictions.
- **Circular reasoning.** Circular reasoning is a logical fallacy in which you try to support your claim by restating it using different language. In other words, all you've done is argue around in a circle rather than advancing the argument to a new conclusion. The statement "We know temporary workers cannot handle this task because temps are unqualified for it" doesn't prove anything because the claim and the supposed evidence are essentially identical.
- **Flawed analogies.** Be sure that the two objects or situations being compared are similar enough for the analogy to hold. For instance, explaining that an internet firewall is like a prison wall is a poor analogy because a firewall keeps things out whereas a prison wall keeps things in.
- **Inappropriate appeals.** Appeals to tradition ("we've always done it this way"), popular opinion ("everybody else is doing this"), or authority ("the CEO says this is the best option") are examples of logical fallacies because they aren't based on evidence and reason.
- **Ad hominem attacks.** An *ad hominem* attack is an attack directed at another person rather than at his or her line of reasoning. For example, dismissing a colleague's suggestion just because he is the newest member of the department is an ad hominem attack.
- **Oversimplifications.** Simplifying complex situations to make them easier to understand is a valuable skill, but going too far can lead to a variety of logical fallacies. For instance, reducing a complicated scenario to a simple yes/no choice in a way that leaves out other viable options is a logical error.
- **Mistaken assumptions or claims of cause and effect.** Be careful with any line of argument that involves causes and effects. You can stumble into a variety of logical mistakes by assuming that *A* caused *B* without having conclusive evidence to support that statement. To argue cause and effect, you need to show that *A* did indeed cause *B* to happen (and it wasn't just coincidence or correlation) and that *A* is the only factor that could have caused *B* to happen. For example, if sales of a certain product dropped the month after you redesigned it, you can't conclude beyond doubt that the redesign hurt sales unless you can demonstrate that buyers didn't like the new design as much has the old one and that no other force in the market (such as a new competitor) was responsible.

Reinforcing Your Position

After you've worked out the basic elements of your argument, step back and look for ways to strengthen your position. How can you bolster your message to give your readers more confidence in the solution you are suggesting? Are all your claims supported by believable evidence? Can you show that other people or companies have adopted a solution you propose?[13] Would a quotation from a recognized expert help make your case? The more certainty you can give your readers, the more likely they are to take the actions you would like them to take.[14]

Choose your words carefully to encourage the desired responses.

Next, examine your language. Can you find more powerful words to convey your message? For example, if your company is in serious financial trouble, talking about *fighting for survival* is a more powerful emotional appeal than talking about *ensuring continued operations*. As with any powerful tool, though, vivid language and abstractions must be used carefully and honestly.

In addition to examining individual word choices, consider using metaphors and other figures of speech. If you want to describe a quality-control system as being designed to detect every possible product flaw, you might call it a "spider web" to imply that it catches everything that comes its way. Similarly, anecdotes (brief stories) can help your audience grasp the meaning and importance of your arguments. Instead of just listing the number of times the old laptop computers in your department have failed, you could describe how you lost a sale when your computer broke down during a critical sales presentation.

Anticipating Objections

Even compelling persuasive messages can encounter audience resistance.

Even compelling ideas and exciting projects can encounter objections, if only because people have a natural tendency to resist change. You can increase your odds of a positive response by anticipating likely objections and addressing them before your audience settles into a negative, defensive mindset. By doing so, you can remove these potential stumbling blocks from the conversation and keep the focus on positive communication.

Note that you don't need to explicitly mention a particular concern. For instance, if your proposal to switch to lower-cost materials is likely to raise questions about quality, you can emphasize that the new materials are just as good as existing materials. You'll not only get this matter out of the way sooner but also demonstrate a broad appreciation of the issue and imply confidence in your message.[15]

If you expect to encounter strong resistance, present all sides of an issue.

If you expect a hostile audience that is biased against your message, be sure to present all sides of the situation. As you cover each option, explain the pros and cons. You'll gain additional credibility if you mention these options before presenting your recommendation or decision.[16] If you can, involve your audience in the design of the solution; people are more likely to support ideas they help create.

APPLY YOUR SKILLS NOW

Making Difficult Requests

Just as they will be on the job, most of the requests you need to make in your academic and personal lives are routine and can be accomplished using the techniques you learned in Chapter 10. However, we all face situations from time to time where we need to make a more difficult request, such as asking an instructor for leniency, asking a landlord or a retailer for special consideration, or asking parents or a partner for help. In these situations, a more persuasive approach might be useful. You can apply many of the strategies for persuasive business messages on pages 355–356 and follow these tips as well:

- Step outside of yourself and your immediate concerns and put yourself in the other person's position. What is this person's current emotional state likely to be? What about his or her mental workload? Imagine you're on that side of the table and you get the request that you're about to make. How would you react?
- Is there any way the other party might benefit from responding positively to your request?
- Emotions may be an important and legitimate part of your request, but for this step, put them aside and focus on objective facts, logic, and ethical principles. How much of your case can you make on these elements alone, without bringing emotion into the mix?
- Now carefully bring emotion into your request, but only to the extent that it supports your request. Strong emotions—even if they are appropriate—can sometimes backfire when you're making a request. You may feel compelled to express these emotions, but keep your eye on the goal, which is your request.
- With the right balance of logical and emotional appeals in mind, choose the direct or indirect approach, based on your relationship with the person and your best judgment. In a close, personal relationship, there are times when it might be better to go direct and open with a simple plea: "Could I ask for your help?" In academic or work relationships, the indirect approach might be better, as long as you can build up to your request quickly. Don't make the recipient wade through a long list of reasons.

You may not get a positive response to your request, and the other party may have legitimate reasons for denying it, but you will know that you did your best.

COACH YOURSELF

1. When you have a difficult request to make, do you find yourself putting it off? This is entirely natural, but remind yourself that the sooner you make the request, the sooner you will get an answer and thereby be able to move on, no matter what sort of answer you get.
2. How do you tend to respond when someone else has a difficult request for you? Do you find it difficult to step out of your own needs and pressures long enough to listen openly and actively? If so, try to mindfully practice this next time someone asks you for help or special consideration. It's a valuable skill that will benefit all your personal and professional relationships.

Avoiding Common Mistakes in Persuasive Communication

Don't let confidence or enthusiasm lead you to some common mistakes in persuasive communication.

When you believe in a concept or project you are promoting, it's easy to get caught up in your own confidence and enthusiasm and thereby fail to see things from the audience's perspective. When putting together persuasive arguments, avoid these common mistakes (see Figure 12.4 on the next page):[17]

- **Using a hard sell.** No one likes being pressured into making a decision. Communicators who take this approach can come across as being more concerned with meeting their own goals than with satisfying the needs of their audiences. In contrast, a "soft sell" is more like a comfortable conversation that uses calm, rational persuasion.
- **Resisting compromise.** Successful persuasion is often a process of give and take, particularly with persuasive business messages, where you don't always get everything you asked for in terms of budgets, investments, or other commitments.
- **Relying solely on great arguments.** Great arguments are important, but connecting with your audience on the right emotional level and communicating through vivid language are just as vital. Sometimes a well-crafted story can be even more compelling than dry logic.
- **Assuming that persuasion is a one-shot effort.** Persuasion is often a process, not a onetime event. In many cases, you need to move your audience members along one small step at a time rather than try to convince them to say "yes" in one huge step.
- **Resorting to deception or other unethical behaviors.** The combination of emotional and logical appeals, amplified by an audience's trust in the messenger, can be a powerful persuasive force. Always keep the audience's needs in mind to make sure you use this force in a positive and ethical manner.

To review the steps involved in developing persuasive messages, refer to "Checklist: Developing Persuasive Messages."

CHECKLIST ✓ Developing Persuasive Messages

A. Get the reader's attention.
- Open with an audience benefit, a stimulating question, a problem, or an unexpected statement.
- Establish common ground by mentioning a point on which you and your audience agree.
- Show that you understand the audience's concerns.

B. Build the reader's interest.
- Expand and support your opening claim or promise.
- Emphasize the relevance of your message to your audience.

C. Increase the reader's desire.
- Make audience members want to change by explaining how the change will benefit them.
- Back up your claims with relevant evidence.

D. Motivate the reader to take action.
- Suggest the action you want readers to take.
- Stress the positive results of the action.
- Make the desired action clear and easy.

E. Balance emotional and logical appeals.
- Use emotional appeals to help the audience accept your message.
- Use logical appeals when presenting facts and evidence for complex ideas or recommendations.
- Avoid faulty logic.

F. Reinforce your position.
- Provide additional evidence of the benefits of your proposal and your own credibility in offering it.
- Use abstractions, metaphors, and other figures of speech to bring facts and figures to life.

G. Anticipate objections.
- Anticipate and answer potential objections.
- Present the pros and cons of all options if you anticipate a hostile reaction.

Ineffective

It's time to call the Fast Track program what it truly is—a disaster. Everyone was excited last year when we announced the plan to speed up our development efforts and introduce at least one new product every month. We envisioned rapidly expanding market share and strong revenue growth. What we got instead is a nightmare that is getting worse every month.

As a company, we clearly underestimated the resources it would take to market, sell, and support so many new products. We can't hire and train fast enough, and every department is overwhelmed. Forced to jump from one new product to the next, the sales and technical specialists can't develop the expertise needed to help buyers before the sale or support them after the sale. As a result, too many customers either buy the wrong product or buy the right product but then can't get knowledgeable help when they need it. We're losing credibility in the market, we're starting to lose sales, and it won't be long before we start losing employees who are fed up with the insanity.

To make matters even worse, some of the recent products were clearly rushed to market before they were ready. With numerous quality issues, returns and warranty costs are skyrocketing.

New products are the lifeblood of the company, to be sure, but there is no point in introducing products that only create enormous support headaches and cost more to support than they generate in profits. We need to put the Fast Track initiative on hold immediately so the entire company can regroup. The R&D lab can devote its time to fixing problems in the recent products, and the rest of us can catch our breath and try to figure out how to meet our sales and customer support goals.

(a) The company has clearly staked a lot on this program, so opening by calling it a disaster will only put the reader on the defensive.

(b) Word choices such as *nightmare* here and *insanity* in the next paragraph give the message an emotional, almost hysterical, tone that detracts from the serious message.

(c) The writer mingles together an observation that may be subjective (declining credibility), a hard data point (declining sales), and a prediction (possibility of employee defections).

(d) The claim that recent products were "clearly rushed to market" is unnecessarily inflammatory (because it blames another department) and distracts the reader from the more immediate problems of poor quality.

(e) The first sentance of the last paragragh in insulting to anyone with basic business sense—particularly the president of a company.

Effective

(a) This neutral summary of events serves as an effective buffer for the indirect approach and provides a subtle reminder of the original goals of the program.

Everyone was excited last year when we launched the Fast Track program to speed up our development efforts and introduce at least one new product every month. We envisioned rapidly expanding market share and strong revenue growth in all our product lines.

(b) This paragraph contains the same information as the ineffective version but does so in a calmer way that won't trigger the reader's defense mechanisms and will thereby keep the focus on the facts.

While the R&D lab has met its goal of monthly releases, as a company, we clearly underestimated the resources it would take to market, sell, and support so many new products. We can't hire and train fast enough, and our teams in every department are overwhelmed. The sales and technical specialists haven't had time to develop the expertise needed to help buyers before the sale or support them after the sale. As a result, too many customers either buy the wrong product or buy the right product but then can't get knowledgeable help when they need it. We're losing credibility in the market, and we're starting to lose sales. If the situation continues, I fear we will begin losing employees, too.

(c) The writer separates a personal hunch (about the possibility of losing employees) from an observation about the market and a measured data point (declining sales).

(d) The writer introduces the information about quality problems without directing blame.

In addition, some of the recent products are generating multiple reports of hardware quality problems and buggy software. Returns and warranty costs are climbing at an unprecedented rate.

(e) With the evidence assembled, the writer introduces the main idea of putting the program on hold. The recommendation is a judgment call and a suggestion to a superior, so the hedging phrase *I believe* is appropriate.

With costs rising faster than revenues and our people getting overwhelmed, I believe it is time to put the Fast Track initiative on hold until the company can regroup. The hiatus would give R&D time to address the quality problems and give the marketing, sales, and tech support teams the chance to reassess our goals with the current product portfolio and our current staffing levels.

Figure 12.4 Persuasive Argumentation

Imagine you're the marketing manager in a company that decided to speed up its new-product launches but did too much too fast and wound up creating chaos. You decide enough is enough and write a memo to the company president advocating that the new program be shut down until the company can regroup—a suggestion you know will meet with resistance. Notice how the ineffective version doesn't quite use the direct approach but comes out swinging, so to speak, and is overly emotional throughout. The effective version builds to its recommendation indirectly, using the same information but in a calm, logical way. Because it sticks to the facts, it is also shorter.

COMMON EXAMPLES OF PERSUASIVE BUSINESS MESSAGES

Throughout your career, you'll have numerous opportunities to write persuasive messages within your organization, such as reports suggesting more-efficient operating procedures or memos requesting money for new equipment. Similarly, you may produce a variety of persuasive messages for people outside the organization, such as websites shaping public opinions or letters requesting adjustments that go beyond a supplier's contractual obligations. In addition, some of the routine requests you studied in Chapter 10 can become persuasive messages if you want a nonroutine result or believe that you haven't received fair treatment. Most of these messages can be divided into persuasive requests for action, persuasive presentations of ideas, and persuasive claims and requests for adjustment.

Persuasive Requests for Action

Most persuasive business messages involve a request for action.

The bulk of your persuasive business messages will involve requests for action. In some cases, your request will be anticipated, so the direct approach is fine. In others, you'll need to introduce your intention indirectly, and the AIDA model or a similar approach is ideal for this purpose (see Figure 12.5 on the next page).

Open with an attention-getting device and show readers that you understand their concerns. Use the interest and desire sections of your message to demonstrate that you have a good reason for making such a request and to cover what you know about the situation: the facts and figures, the benefits of helping, and any history or experience that will enhance your appeal. Your goals are (1) to gain credibility (for yourself and your request) and (2) to make your readers believe that helping you will indeed help solve a significant problem. Close with a request for some specific action, and make that course of action as easy to follow as possible to maximize the chances of a positive response.

Persuasive Presentations of Ideas

Sometimes the objective of persuasive messages is simply to encourage people to consider a new idea or a different perspective.

You may encounter situations in which you simply want to change attitudes or beliefs about a topic without asking the audience to decide or do anything—at least not yet. The goal of your first message might be nothing more than convincing your audience to reexamine long-held opinions or to admit the possibility of new ways of thinking.

For instance, the World Wide Web Consortium, a global association that defines many of the guidelines and technologies behind the World Wide Web, launched a campaign called the Web Accessibility Initiative. Although the consortium's ultimate goal is to make websites more accessible to people who have disabilities or age-related limitations, a key interim goal is simply making website developers more aware of the need. As part of this effort, the consortium has developed a variety of presentations and documents that highlight the problems many web visitors face.[18]

Persuasive Claims and Requests for Adjustments

Most claims are routine messages and use the direct approach discussed in Chapter 10. However, consumers and business professionals sometimes encounter situations in which they believe they haven't received a fair deal by following normal procedures. These situations require a more persuasive message.

An effective persuasive claim includes a complete and specific review of the facts and establishes a confident, positive tone.

The key ingredients of a good persuasive claim are a complete and specific review of the facts and a confident and positive tone based on your right to be satisfied with every transaction. Begin persuasive claims by outlining the problem, and continue by reviewing what has been done about it so far, if anything. The recipient might be juggling numerous claims and other demands on his or her attention, so be clear, calm, and complete when presenting your case. Be specific about how you would like the situation to be resolved.

Next, give your reader a good reason for granting your claim. Show how the individual or organization is responsible for the problem, and appeal to your reader's sense of fair play, goodwill, or moral responsibility. Explain how you feel about the problem, but don't get carried away and don't make threats. People generally respond most favorably to requests that are calm and reasonable. Close on a respectful note that reflects how a successful resolution of the situation will repair or maintain a mutually beneficial working relationship.

1 Plan → **2 Write** → **3 Complete**

Analyze the Situation
Verify that the purpose is to address a major business challenge, so the audience will be receptive.

Gather Information
Determine audience needs and obtain the necessary information.

Choose Medium and Channel
Verify that an email message is appropriate for this communication.

Organize the Information
Limit the scope to the main idea, which is to propose exploring a new business strategy; use the indirect approach to lay out the extent of the problem.

Adapt to Your Audience
Adjust the level of formality based on the degree of familiarity with the audience; maintain a positive relationship by using the "you" attitude, politeness, positive emphasis, and bias-free language.

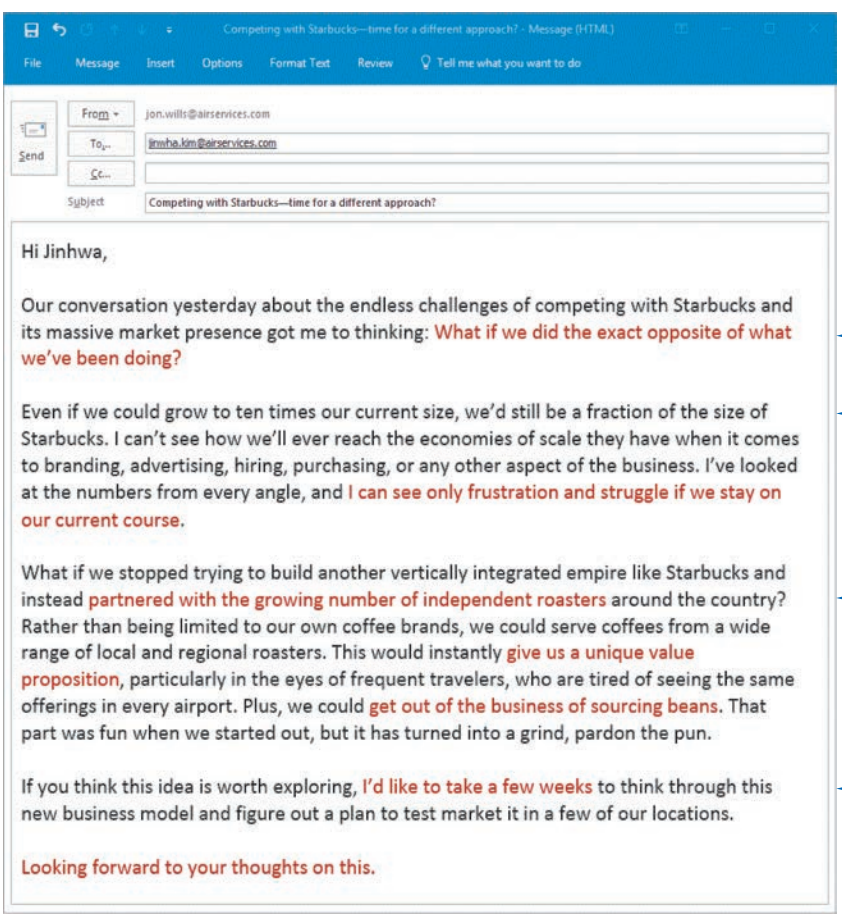
Compose the Message
Use a conversational but professional style and keep the message brief, clear, and as helpful as possible.

Revise the Message
Evaluate content and review readability to make sure the information is clear and complete without being overwhelming.

Produce the Message
Emphasize a clean, professional appearance.

Proofread the Message
Review for errors in layout, spelling, and mechanics.

Distribute the Message
Verify that the right file is attached and then deliver the message.



Attention: The writer gets the reader's attention with a provocative question.

Interest: This paragraph "sells the problem" that the writer wants to fix. By convincing the reader that the current course of action isn't sustainable, the writer sparks Jinhwa's interest in hearing about an alternative strategy.

Desire: To build Jinhwa's desire to consider a new approach, the writer lists some key benefits that the new strategy could bring.

Action: The call to action asks Jinhwa for permission to take time off from his regular duties for a few weeks.

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Figure 12.5 Persuasive Message Using the AIDA Model
This writer uses the AIDA model to persuade his manager to give him a few weeks away from his regular duties to explore a new business strategy. The passages in red are key points in each step of the AIDA approach. (These passages would not appear in red in the actual email message.)

Developing Marketing and Sales Messages

3 LEARNING OBJECTIVES

Describe an effective strategy for developing marketing and sales messages, and explain how to modify your approach when writing promotional messages for social media.

Marketing and sales messages use the same basic techniques as other persuasive messages, with the added emphasis of encouraging someone to participate in a commercial transaction. Although the terms *marketing message* and *sales message* are often used interchangeably, there is an important difference: **Marketing messages** usher potential buyers through the purchasing process without asking them to make an immediate decision. **Sales messages** take over at that point, encouraging potential buyers to make a purchase decision then and there. Marketing messages focus on such tasks as introducing new brands to the public and encouraging customers to visit websites for more information, whereas sales messages make an explicit request for people to buy a specific product or service.

Marketing messages usher potential buyers through the purchasing process without asking them to make an immediate decision.

Sales messages encourage potential buyers to make a purchase decision.

Most marketing and sales messages, particularly in larger companies, are created and delivered by professionals with specific training in marketing, advertising, sales, or public relations. However, in smaller companies, you may be called on to review the work of these specialists or to write such messages, and having a good understanding of how these messages work will help you be a more effective manager.

PLANNING MARKETING AND SALES MESSAGES

Everything you've learned about planning messages applies in general to marketing and sales messages, but the planning steps for these messages have some particular aspects to consider as well:

- **Assessing audience needs.** As with every other business message, successful marketing and sales messages start with an understanding of audience needs. Depending on the product and the market, these considerations can range from a few functional factors (such as the size, weight, and finish of office paper) to a complicated mix of emotional and logical issues (all the factors that play into buying a house, for example).

Understanding the purchase decision from the buyer's perspective helps you frame an effective marketing or sales message.

- **Analyzing your competition.** Marketing and sales messages nearly always compete with messages from other companies trying to reach the same audience. When Nike plans a marketing campaign to introduce a new shoe model to current customers, the company knows its audience has also been exposed to messages from Adidas, New Balance, Reebok, and numerous other shoe companies. Finding a unique message in crowded markets can be quite a challenge.

Marketing and sales messages nearly always compete for the audience's attention.

- **Determining key selling points and benefits.** With some insight into audience needs and the alternatives offered by your competitors, the next step is to decide which features and benefits to highlight. **Selling points** are the most attractive features of a product, whereas benefits are the advantages purchasers can realize from those features. In other words, selling points focus on what the product does. **Benefits** focus on what the user experiences or gains. Benefits can be practical, emotional, or a combination of the two. For example, the feature of a thin, flexible sole in a running shoe offers the practical benefit of a more natural feel while running. In contrast, the visual design features of the shoe offer no practical benefits but can offer the emotional benefit of wearing something stylish or unusual.

Selling points focus on the product; *benefits* focus on how product features help the user.

- **Anticipating purchase objections.** Marketing and sales messages usually encounter objections. As with persuasive business messages, the best way to handle them is to identify these objections up front and address as many as you can. Objections can range from high price or low quality to a lack of compatibility with existing products or a perceived risk involved with the product. If price is a likely objection, for instance, you can look for ways to increase the perceived value of the purchase and decrease the perception of high cost. When promoting a home gym, you might say that it costs less than a year's worth of health club dues. Of course, any attempts to minimize perceptions of price or other potential negatives must be done ethically.

Anticipate buyer objections and try to address them before they become stumbling blocks.

MOBILE APP

Talkwalker helps companies monitor social media conversations in real time.

WRITING CONVENTIONAL MARKETING AND SALES MESSAGES

Conventional marketing and sales messages are often prepared using the AIDA model or some variation of it. (See the next section on crafting messages for social media.) Here are the key points of using the AIDA model for these messages:

- **Getting the reader's attention.** By looking and listening during any given day, you'll notice the many ways advertisers try to get your attention. For example, a headline might offer an exciting product benefit, a piece of interesting news, an appeal to people's emotions or sense of financial value, or a unique solution to a common problem. Of course, words aren't the only attention-getting devices. Depending on the medium, marketers can use evocative images, music, animation, or video. "Cutting through the clutter" to get the audience's attention is one of the biggest challenges with marketing and sales messages.

To build interest, expand on and support the promises in your attention-getting opening.

- **Building interest.** After catching the reader's or viewer's attention, your next step is to build interest in the product, company, or idea you are promoting. A common technique is to "pay off" the promise made in the headline by explaining how you can deliver those benefits. For example, if the headline offers a way to "Get Fit for $2 a Day," the first paragraph could explain that the home gyms your company sells start at less than $700, which works out to less than $2 a day over the course of a year.

Add details and audience benefits to increase desire for the product or service.

- **Increasing desire.** Now that you've given the audience some initial information to start building interest, the next step is to boost desire for the product by expanding on your explanation of its benefits. Think carefully about the sequence of support points, and use plenty of subheadings, hyperlinks, video demonstrations, and other devices to help people quickly find the information they need. You can also use a variety of techniques to address potential objections and minimize doubts, including testimonials from satisfied users, articles written by industry experts, competitive comparisons, offers of product samples or free demonstrations, independent test results, and money-back guarantees.

After you've generated sufficient interest and desire, you're ready to persuade readers to take the preferred action.

- **Motivating action.** The final step in the AIDA model is persuading the audience to take action, such as encouraging people to pick up the phone to place an order or visit an online app store to download your software. The keys to a successful call to action are making it as easy and as risk-free as possible. If the process is confusing or time-consuming, you'll lose potential customers.

If you analyze the advertisements you encounter in any medium, you'll see variations on these techniques used again and again.

WRITING PROMOTIONAL MESSAGES FOR SOCIAL MEDIA

The AIDA model and similar approaches have been successful with marketing and sales messages for decades, but in the social media landscape, consumers are more apt to look for product information from other consumers, not the companies marketing those products. Consequently, your emphasis should shift to encouraging and participating in online conversations. Follow these guidelines:[19]

- **Facilitate community building.** Give customers and other audiences an opportunity to connect with you and one another, such as on your Facebook page or through members-only online forums (see Figure 12.6).
- **Listen at least as much as you talk.** Listening is just as essential for online conversations as it is for in-person conversations.
- **Initiate and respond to conversations within the community.** Through content on your website, blog posts, social network profiles and messages, newsletters, and other tools, make sure you provide the information customers need to evaluate your products and services. Use an objective, conversational style; people in social networks want useful information, not "advertising speak."
- **Provide information people want.** This information can include industry-insider news, in-depth technical guides to using your products, answers to questions posted on community Q&A sites, and general advice on product selection and usage.



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Figure 12.6 Promotional Messages in Social Media
Procter & Gamble (P&G) uses social media to foster positive relationships with customers, communities, and other company stakeholders.

This strategy of **content marketing** is a great way to build customer relationships by providing value-added information.

Content marketing is a strategy of providing valuable content to customers and potential customers.

- **Identify and support your champions.** In marketing, *champions* are enthusiastic fans of your company and its products. Champions are so enthusiastic they help spread your message through their social media accounts and other outlets, defend you against detractors, and help other customers use your products.
- **Be real.** Social media audiences respond positively to companies that are open and conversational about themselves, their products, and subjects of shared interest. In contrast, if a company is serving its stakeholders poorly with shoddy products, bad customer service, or unethical behavior, an attempt to improve its reputation by adopting social media without fixing the underlying problems is likely to fail as soon as audiences see through the superficial attempt to "be social."
- **Integrate conventional marketing and sales strategies at the right time and in the right places.** AIDA and similar approaches are still valid for specific communication tasks, such as conventional advertising and the product promotion pages on your website.

CREATING PROMOTIONAL MESSAGES FOR MOBILE DEVICES

Mobile advertising and mobile commerce (sometimes referred to as *m-commerce*) are two of the hottest developments in marketing communications. Companies are putting so much emphasis on mobile marketing because mobile devices now play such a big role in consumer buying behavior. Smartphone owners tend to use their devices for many shopping-related tasks, from searching for product reviews to finding stores and service businesses, looking for coupons and other promotions, and doing in-store price comparisons.[20]

If you are involved with creating mobile marketing or sales messages, keep two essential points in mind. First, like all mobile messages, promotional messages need to be kept short and simple. Second, the mobile experience needs to be fast and straightforward. Mobile users are often time-constrained, and they will quickly abandon websites that don't load quickly or are confusing to navigate.

Promotional messages aimed at mobile audiences need to be short, simple, and easy to respond to.

Maintaining High Standards of Ethics, Legal Compliance, and Etiquette

4 LEARNING OBJECTIVES
Identify steps you can take to avoid ethical lapses in marketing and sales messages.

Marketing and sales messages are covered by a wide range of laws and regulations.

The word *persuasion* has negative connotations for some people, especially in a marketing or sales context. However, ethical businesspeople view persuasion as a positive force, aligning their own interests with what is best for their audiences. To maintain the highest standards of business ethics, always demonstrate the "you" attitude by showing honest concern for your audience's needs and interests.

As marketing and selling grow increasingly complex, so do the legal ramifications of marketing and sales messages. In the United States, the Federal Trade Commission (FTC) has the authority to impose penalties (ranging from cease-and-desist orders to multimillion-dollar fines) on advertisers who violate federal standards for truthful advertising. Other federal agencies have authority over advertising in specific industries, such as transportation and financial services. Individual states have additional laws that may apply. The legal aspects of promotional communication can be quite complex, varying from state to state and from country to country, and most companies require marketing and salespeople to get clearance from company lawyers before sending messages.

Moreover, communicators must stay on top of changing regulations, such as the latest laws governing unsolicited bulk email ("spam"), privacy, data security, and disclosure requirements for bloggers who review products. For example, two ethical concerns that could produce new legislation are *behavioral targeting*, which tracks the online behavior of website visitors and serves up ads based on what they seem to be interested in, and *remarketing* or *retargeting*, in which behaviorally targeted ads follow users even as they move on to other websites.[21]

For all marketing and sales efforts, pay close attention to the following legal considerations:[22]

- **Marketing and sales messages must be truthful and nondeceptive.** The FTC considers messages to be deceptive if they include statements that are likely to mislead reasonable customers and if those statements are an important part of the purchasing decision. The FTC distinguishes between subjective claims (commonly known as *puffery*), which cannot be proven true or false, and objective claims, which can be proved or disproved. Puffery is legally allowable, but deception is not. For example, "Tastiest Coffee in Tennessee" is puffery because it is neither provable nor disprovable. However, claiming that a coffee is organic when it was grown with chemical fertilizers is deceptive.

ETHICS DETECTIVE

Solving the Case of the Incredible Credibility

As the director of human resources in your company, you're desperate for some help. You want to keep the costs of employee benefits under control while making sure you provide employees with a fair benefits package. You don't have time to research all the options for health insurance, wellness programs, retirement plans, family counseling, educational benefits, and everything else, so you decide to hire a consultant. You receive the following message from a consultant interested in working with you:

> I am considered the country's foremost authority on employee health insurance programs. My clients offer universally positive feedback on the programs I've designed for them. They also love how much time I save them—hundreds and hundreds of hours. I am absolutely confident that I can thoroughly analyze your needs and create a portfolio that realizes every degree of savings possible. I invite you to experience the same level of service that has generated such comments as "Best advice ever!" and "Saved us an unbelievable amount of money."

You'd love to get results like that, but the message almost sounds too good to be true. Is it?

ANALYSIS

The consultant's message contains at least a dozen instances in which this writer's credibility might be questioned. Identify as many as you can, and explain how you would bolster reader confidence by providing additional or different information.

- **You must back up your claims with evidence.** According to the FTC, offering a money-back guarantee or providing letters from satisfied customers is not enough; you must still be able to support your claims with objective evidence, such as a survey or scientific study.
- **"Bait and switch" advertising is illegal.** Trying to attract buyers by advertising a product that you don't intend to sell—and then trying to sell them another (and usually more expensive) product—is illegal.
- **Marketing messages and websites aimed at children are subject to special rules.** For example, online marketers must obtain consent from parents before collecting personal information about children under age 13.
- **Companies must disclose when they give products to online reviewers.** Given the strong influence of online product reviews, some companies give products to consumers in exchange for their reviews on Amazon and other retail sites. The practice is not illegal, but it must be disclosed.
- **Celebrities and other social media influencers must disclose when they are compensated to endorse products.** For instance, the FTC suggests that celebrities use the hashtag #ad when posting photos or tweets that endorse products.
- **Companies that coordinate with product champions and social media influencers have a degree of responsibility for what those people say to the public.** Marketers are expected to train these people in responsible communication and monitor what these outside parties write and say about their products.

COMMUNICATION CHALLENGES AT Stitch Fix

You've joined Stitch Fix as customer communications specialist. Use what you've learned in this chapter to address these challenges.

INDIVIDUAL CHALLENGE: Even with the convenience of online shopping, many consumers still prefer to buy clothes in person at a "bricks and mortar" retail store. Think about why these people might resist shopping online for clothes, and then draft a message of 100 words or so that could convince them to try Stitch Fix rather than going to the mall.

TEAM CHALLENGE: With a team assigned by your instructor, brainstorm a message for consumers who believe there is little difference between Stitch Fix and Amazon. Explore the Stitch Fix website to identify at least two ways that the Stitch Fix shopping experience is different, and then draft a message of roughly 150 words that could be posted online or used as a response to email or messaging inquiries. You can use ideas you find on the Stitch Fix website, but phrase the message in your own words.

Key Terms

AIDA model Persuasive message sequence that involves attention, interest, desire, and action
benefits The advantages that readers will realize from a product's selling points
content marketing Strategy of sharing valuable information with potential customers to help build affinity for your brand
demographics Quantifiable characteristics of a population, including age, gender, occupation, income, and education
emotional appeal Persuasive approach that calls on audience feelings and sympathies rather than facts, figures, and rational arguments
logical appeal Persuasive approach that calls on reasoning and evidence
marketing messages Promotional messages that usher potential buyers through the purchasing process without asking them to make an immediate decision
motivation The combination of forces that drive people to satisfy their needs
persuasion The attempt to change an audience's attitudes, beliefs, or actions
psychographics Psychological characteristics of an audience, including personality, attitudes, and lifestyle
sales messages In contrast to marketing messages, sales messages encourage potential buyers to make a purchase decision then and there
selling points The most attractive features of a product or service

Summary of Learning Objectives

1 Apply the three-step writing process to persuasive messages. To plan persuasive messages, carefully clarify your purpose to make sure you focus on a single goal. Understand audience needs, which can involve research to

identify relevant demographic and psychographic variables and to assess audience motivations. Persuasive messages usually ask people to give up time, money, or other resources, so gathering the right information to convince readers of the benefits of responding is essential. Media choices need to be considered carefully, particularly with marketing and sales messages in a social media landscape. For organizing persuasive messages, you will usually want to choose the indirect approach to establish awareness and interest before asking the audience to take action.

When writing persuasive messages, use positive and polite language, understand and respect cultural differences, be sensitive to organizational cultures when writing persuasive business messages, and take steps to establish your credibility. Seven common ways to establish credibility in persuasive messages are using simple language, supporting your claims, identifying your sources, establishing common ground, being objective, displaying good intentions, and avoiding the hard sell.

The steps for completing persuasive messages are the same as for other types of messages, but accuracy and completeness are especially important because they send signals about your credibility—a crucial element in persuasive messages.

2 Describe an effective strategy for developing persuasive business messages, and identify the three most common categories of persuasive business messages. Within the context of the three-step process, effective persuasion involves four essential strategies: framing your arguments, balancing emotional and logical appeals, reinforcing your position, and anticipating objections. One of the most commonly used methods for framing a persuasive argument is the AIDA model, in which you open your message by getting the audience's attention; build interest with facts, details, and additional benefits; increase desire by providing more evidence and answering possible objections; and motivate a specific action.

Persuasive communication is based on three types of appeals: *ethos* (the ethical dimension, particularly your credibility as the writer), *pathos* (appeals to emotion), and *logos* (argumentation based on logic and evidence). Most messages combine emotional and logical appeals. To reinforce your position, look for ways to add convincing evidence, quotations from experts, or other support material.

By identifying potential objections and addressing them as you craft your message, you can help prevent audience members from gravitating toward negative answers before you have the opportunity to ask them for a positive response. You can often resolve these issues before the audience has a chance to go on the defensive.

The most common types of these messages are (1) persuasive requests for action, in which you ask the recipient to make a decision or engage in some activity; (2) persuasive presentations of ideas, in which you aren't necessarily looking for a decision or action but rather would like the audience to consider a different way of looking at a particular topic; and (3) persuasive claims and requests for adjustments, in which you believe that you have not received fair treatment under an organization's standard policies and would like the recipient to give your case fresh consideration.

3 Describe an effective strategy for developing marketing and sales messages, and explain how to modify your approach when writing promotional messages for social media. Marketing and sales messages use the same basic techniques as other persuasive messages, with the added emphasis of encouraging someone to participate in a commercial transaction. Marketing messages do this indirectly, whereas sales messages do it directly. The basic strategy for creating these messages includes assessing audience needs, analyzing your competition, determining key selling points and benefits, anticipating purchase objections, applying AIDA or a similar model, adapting your writing to social media (if appropriate), and maintaining high standards of ethical and legal compliance.

To use social media for promotional communication, start by engaging audiences with efforts to build networked communities of potential buyers and other interested parties. Listen to conversations taking place about your company and its products. Initiate and respond to conversations within these communities, being sure to use an objective, conversational style. Provide the information interested parties want. Identify and support the enthusiastic product champions who want to help spread your message. Be authentic and transparent in all your communication. Speak directly to customers so you don't have to rely on the news media. Finally, continue to use the AIDA model or similar approaches, but only at specific times and places, as part of a broader, conversational approach.

4 Identify steps you can take to avoid ethical lapses in marketing and sales messages. Effective and ethical persuasive communicators focus on aligning their interests with the interests of their audiences. They help audiences understand how their proposals will provide benefits to the audience, using language that is persuasive without being manipulative. They choose words that are less likely to be misinterpreted and take care not to distort the truth. Throughout, they maintain a "you" attitude with honest concern for the audience's needs and interests. By following applicable laws and regulations, marketers can avoid many ethical problems.

Test Your Knowledge

To review chapter content related to each question, refer to the indicated Learning Objective.

12-1. What are four ways you can build credibility with an audience when planning a persuasive message? [LO-1]
12-2. What is the AIDA model, and what are its limitations? [LO-2]
12-3. How do emotional appeals differ from logical appeals? [LO-2]
12-4. What three types of reasoning can you use in logical appeals? [LO-2]
12-5. Why do the AIDA model and similar approaches need to be modified when writing persuasive messages in social media? [LO-3]
12-6. What is conversation marketing? [LO-3]
12-7. How do marketing and sales messages differ? [LO-3]
12-8. What is likely to happen if you don't anticipate audience objections when crafting your messages? [LO-2], [LO-3]

12-9. Why do promotional messages need to be short and simple on mobile devices? [LO-3]

12-10. How does ethical behavior contribute to positive etiquette in persuasive messages? [LO-4]

Apply Your Knowledge

To review chapter content related to each question, refer to the indicated Learning Objective.

12-11. Why is it essential to understand your readers' motivations before writing a persuasive message? [LO-1]

12-12. Why is it important to present all sides of an argument when writing a persuasive message to a potentially hostile audience? [LO-2]

12-13. Are emotional appeals ethical? Why or why not? [LO-2]

12-14. What is likely to happen if a promotional message starts immediately with a call to action? Why? [LO-3]

12-15. Are promotional slogans such as "Best sushi in town" or "Atlanta's most popular restaurant" ethical? Why or why not? [LO-4]

Practice Your Skills

Messages for Analysis

Read the following documents and then (1) analyze the strengths and weaknesses of each sentence and (2) revise each document so that it follows this chapter's guidelines.

12-16. Message Strategies: Persuasive Claims and Requests for Adjustment [LO-2]

Dear TechStar Computing:

I'm writing to you because of my disappointment with my new multimedia PC display. The display part works all right, but the audio volume is set too high and the volume knob doesn't turn it down. It's driving us crazy. The volume knob doesn't seem to be connected to anything but simply spins around. I can't believe you would put out a product like this without testing it first.

I depend on my computer to run my small business and want to know what you are going to do about it. This reminds me of every time I buy electronic equipment from what seems like any company. Something is always wrong. I thought quality was supposed to be important, but I guess not. Anyway, I need this fixed right away. Please tell me what you want me to do.

12-17. Message Strategies: Sales Messages [LO-3]

We know how awful dining hall food can be, and that's why we've developed the "Mealaweek Club." Once a week, we'll deliver food to your dormitory or apartment. Our meals taste great. And they are healthy. Or not—we have those options, too!

When you sign up for just six months, we will ask what day you want your delivery. We'll ask you to fill out your selection of meals. And the rest is up to us. At "Mealaweek," we deliver! And payment is easy. We accept all kinds of credit cards and payment apps (Venmo, etc.). It will save money especially when compared with eating out.

Just fill out the enclosed card and indicate your method of payment. As soon as we approve your credit or check, we'll begin delivery. Tell all your friends about Mealaweek. We're the best idea since sliced bread!

Exercises

Each activity is labeled according to the primary skill or skills you will need to use. To review relevant chapter content, you can refer to the indicated Learning Objective. In some instances, supporting information will be found in another chapter, as indicated.

Choosing a Message Strategy [LO-1], Chapters 10–12 Now that you've explored routine, positive, negative, and persuasive messages, review the following message scenarios and identify which of the four message strategies would be most appropriate for the situation. Offer a brief justification for your choices. (Depending on the circumstances, a scenario might lend itself to more than one type of message; just be sure to offer compelling reasons for your choices.)

12-18. An unsolicited message to your department manager explaining why you believe the company's experiment with self-managed work teams has not been successful

12-19. An unsolicited message to your department manager explaining why you believe the company's experiment with self-managed work teams has not been successful and suggesting that one of the more experienced employees (such as yourself) should be promoted to supervisor

12-20. A message to a long-time industrial customer explaining that a glitch in your accounting system resulted in the customer being overcharged on its last five orders, apologizing for the problem, and assuring the customer that you will refund the overcharged amount immediately

12-21. A news release announcing that your company plans to invite back 50 employees who were laid off earlier in the year

Message Strategies: Persuasive Business Messages; Collaboration: Team Projects [LO-2] With another student, analyze the persuasive email message in Figure 12.5 by answering the following questions:

12-22. What techniques does the writer use to capture the reader's attention?

12-23. Does the writer use the direct or indirect organizational approach? Why?

12-24. Is the subject line effective? Why or why not?

12-25. How does the writer balance emotional and logical appeals?

12-26. What reader benefits are included?

12-27. How does the writer establish credibility?

12-28. What tools does the writer use to reinforce his position?

Message Strategies: Persuasive Business Messages, Marketing and Sales Messages: Media Skills: Email [LO-2], [LO-3] Compose effective subject lines for the following persuasive email messages:

12-29. A recommendation was sent by email to your branch manager to install wireless networking throughout the facility. Your primary reason is that management has encouraged more teamwork, but teams often congregate in meeting rooms, the cafeteria, and other places

that lack reliable network access—without which they can't do much of the work they are expected to do.

12-30. An email message to the company president, asking that employees be allowed to carry over their unused vacation days to the following year. Apparently, many employees canceled their fourth-quarter vacation plans to work on the installation of a new company computer system. Under their current contract, vacation days not used by December 31 can't be carried over to the following year.

12-31. **Communication Ethics: Making Ethical Choices [LO-2], [LO-4]** Your boss has asked you to post a message on the company's internal blog, urging everyone in your department to donate money to the company's favorite charity, an organization that operates a summer camp for children with physical challenges. You wind up writing a lengthy posting, packed with facts and heartwarming anecdotes about the camp and the children's experiences. When you must work that hard to persuade your audience to take an action such as donating money to a charity, aren't you being manipulative and unethical? Explain.

Message Strategies: Marketing and Sales Messages [LO-3] Determine whether the following sentences focus on selling points or benefits; rewrite as necessary to focus all the sentences on benefits.

12-32. All-Cook skillets are coated with a durable, patented nonstick surface.

12-33. These training shoes use an injection-molded foam midsole that provides optimum cushioning.

12-34. The MessageStar messaging app seamlessly connects to all major messaging services so you can communicate with all your friends and colleagues, no matter what systems they use.

Expand Your Skills

Critique the Professionals

Visit the Facebook pages of six companies in several industries. How do the companies make use of Facebook? Do any of the companies use posts to promote their products? Compare the material on the About tabs. Which company has the most compelling information here? How about the use of custom tabs—which company does the best job of using this Facebook feature? Using whatever medium your instructor requests, write a brief analysis of the message (no more than one page), citing specific elements from the piece and support from the chapter.

Sharpening Your Career Skills Online

Find a website, video, article, podcast, or PowerPoint presentation that offers advice on writing persuasive messages (either persuasive business messages or marketing and sales messages). Write a brief email message to your instructor describing the item you found and summarizing the career skills information you learned from it.

Build Your Career

As you get ready to create or update your résumé, you'll face the question of which organizational format to use. As pages 526–527 in Chapter 18 explain, there are three basic structures, and the best choice depends on where you are in your career. The *chronological résumé* highlights work experience and shows your employment history in reverse chronological order, with your most recent job first. The *functional résumé* or *skills résumé* highlights your skills and capabilities rather than your work history, but many employers are suspicious of this format because it can be used to obscure a problematic career path. The *combination résumé* is a hybrid of these two, highlighting skills and capabilities while still giving an idea of your work and educational progress.

If you have a few years of work experience that is related to the jobs you are applying for, the chronological résumé is your best choice. This is the format most employers prefer because it lets recruiters quickly get a sense of your work history. If you don't have much work experience yet, no problem—go with the combination résumé because it lets you highlight the skills and knowledge you gained through your education while still giving a chronological sense of your life history.

Cases

For all cases, feel free to use your creativity to make up any details you need to craft effective messages.

Persuasive Business Messages

MICROBLOGGING SKILLS

12-35. Message Strategies: Persuasive Business Messages [LO-2] You've been trying for months to convince your boss, company CEO Will Florence, to start using Twitter. You've told him that top executives in numerous industries now use Twitter to connect with customers and other stakeholders without going through the filters and barriers of formal corporate communications, but he doesn't see the value.

Your task: You come up with a brilliant plan to demonstrate Twitter's usefulness using Twitter itself. First, find the Twitter accounts of Mary Barra, CEO of General Motors; Marc Benioff, CEO of Salesforce.com; and a third CEO of any company that interests you. Second, study their tweets to get a feel for the type of information they share. Third, if you don't already have a Twitter account set up for this class, set one up for the purposes of this exercise (you can deactivate it later). Fourth, write four tweets to demonstrate the value of executive microblogging: one that summarizes the value of having a company CEO use Twitter, followed by three support tweets, each one summarizing how your three real-life executive role models use Twitter.

EMAIL SKILLS/TEAM SKILLS

12-36. Message Strategies: Persuasive Business Messages [LO-2] At lunch with a colleague from your department last week, you discovered that as much as you both love your jobs, family obligations are making it difficult to keep working full time. Unfortunately, your company doesn't offer any conventional part-time jobs because it needs to keep positions such as yours staffed five days a week. However, you have heard about the concept of job sharing, in which two people divide a single job.

Your task: With a partner, research job sharing. The Case Studies section of the WorkMuse website (**workmuse.com**) offers real-life examples of professional duos who successfully share jobs. Identify the pros and cons from the perspectives of the employer and the employees involved. Using the AIDA approach, draft a persuasive email message to your supervisor outlining the benefits and addressing the potential problem areas. Your call to action should be to ask your supervisor to propose job sharing to company management.

EMAIL SKILLS

12-37. Message Strategies: Persuasive Business Messages [LO-2] While sitting at your desk during lunch break, slumped over as usual, staring at your computer screen, you see an online article about the dangers of sitting at your desk all day. Yikes. The article suggests trying a standing desk—or, even better, a treadmill desk, which has an exercise treadmill built into a standing desk. You'd love to lose a few pounds while being healthier and feeling more alert during the day. Plus, you know the company is encouraging employees to live healthier lifestyles to improve their overall well-being while also reducing the company's health-care costs.

Your task: Research the treadmill desks made by LifeSpan, NordicTrack, or another manufacturer and write a persuasive email message to your boss requesting that the company buy or rent a treadmill desk for you to try out. Offer to serve as a research subject for the whole office, tracking your weight loss, alertness, and any other relevant variables you can think of.

BLOGGING SKILLS/TEAM SKILLS

12-38. Message Strategies: Writing Instructions [LO-4] Message Strategies: Persuasive Business Messages [LO-2] As a strong advocate for the use of social media in business, you are pleased by how quickly people in your company have taken up blogging, wiki writing, and other new-media activities. You are considerably less excited by the style and quality of what you see in the writing of your colleagues. Many seem to have interpreted "authentic and conversational" to mean "anything goes." Several of the Twitter users in the company seem to have abandoned any pretense of grammar and spelling. A few managers have dragged internal disagreements about company strategy into public view, arguing with each other through comments on various industry-related forums. Product demonstration videos have been posted to the company's YouTube channel virtually unedited, making the whole firm look unpolished and unprofessional. The company CEO has written some blog posts that bash competitors with coarse and even crude language.

You pushed long and hard for greater use of these tools, so you feel a sense of responsibility for this situation. In addition, you are viewed by many in the company as the resident expert on social media, so you have some "expertise authority" on this issue. On the other hand, you are only a first-level manager, with three levels of managers above you, so while you have some "position authority" as well, you can hardly dictate best practices to the managers above you.

Your task: Working with two other students, write a post for the company's internal blog (which is not viewable outside the company) outlining your concerns about these communication practices. Use the examples mentioned previously, and make up any additional details you need. Emphasize that while social media communication is often less formal and more flexible than traditional business communication, it shouldn't be unprofessional. You are thinking of proposing a social media training program for everyone in the company, but for this message you just want to bring attention to the problem.

LETTER-WRITING SKILLS

12-39. Message Strategies: Persuasive Business Messages [LO-2] The Peet's Coffee location across the street from your tiny apartment is your haven away from home—great beverages, healthy snacks, fast and free wireless, and an atmosphere that is convivial but not so lively that you can't focus on your homework. It lacks only one thing: some way to print out your homework and other files when you need hard copies. Your college's libraries and computer labs provide printers, but you live three miles from campus, and it's a long walk or an inconvenient bus ride.

Your task: Write a letter to the store manager encouraging her to set up a printing service to complement the free wireless access. Propose that the service run at break-even prices, just enough to pay for paper, ink cartridges, and the cost of the printer itself. The benefit to the shop would be enticing patrons to spend more time—and, therefore, more of their coffee and tea money—in the shop. You might also mention that you had to take the bus to campus to print this letter, so you bought your afternoon latté somewhere else.

EMAIL SKILLS/PORTFOLIO BUILDER

12-40. Message Strategies: Persuasive Business Messages [LO-2] As someone who came of age in the "post-email" world of social networks and workgroup messaging, you were rather disappointed to find your new employer solidly stuck in the age of email. You use email, of course, but it is only one of the tools in your communication toolbox. From your college years, you have hands-on experience with a wide range of social media tools, having used them to collaborate on school projects, to become involved in your local community, to learn more about various industries and professions, and to research potential employers during your job search. (In fact, without social media, you might never have heard about your current employer in the first place.) Moreover, your use of social media on

the job has already paid several important dividends, including finding potential sales contacts at several large companies, connecting with peers in other companies to share ideas for working more efficiently, and learning about some upcoming legislative matters in your state that could profoundly hamper your company's current way of doing business.

You hoped that by setting an example through your own use of social media at work, your new colleagues and company management would quickly adopt these tools as well. Unfortunately, just the opposite has happened. Waiting in your email inbox this morning was a message from the CEO announcing that the company is now cutting off access to social networking websites and banning the use of any social media at work. The message says using company time and company computers for socializing is highly inappropriate and might be considered grounds for dismissal in the future if the problem gets out of hand.

Your task: You are stunned by the message. You fight the urge to fire off a hotly worded reply to straighten out the CEO's misperceptions. Instead, you wisely decide to send a message to your immediate superior first, explaining why you believe the new policy should be reversed. Using your boss's favorite medium (email, of course!), write a persuasive message explaining why Facebook, Twitter, and other social networking technologies are valid—and valuable—business tools. Bolster your argument with examples from other companies and advice from communication experts.

EMAIL SKILLS

12-41. Message Strategies: Requests for Action [LO-2] Managing a new-product launch can be an aggravating experience as you try to coordinate a wide variety of activities and processes while barreling toward a deadline that is often defined more by external factors than a realistic assessment of whether you can meet it. You depend on lots of other people to meet their deadlines, and if they fail, you fail. The pressure is enough to push anybody over the edge. Unfortunately, that happened to you last week. After a barrage of bad news from suppliers and the members of the team you lead, you lost your cool in a checkpoint meeting. Shouting at people and accusing them of slacking off was embarrassing enough, but the situation got a hundred times worse this morning when your boss suggested you needed some low-pressure work for a while and removed you as the leader of the launch team.

Your task: Write an email message to your boss, Sunil, requesting to be reinstated as the project team leader. Make up any information you need.

EMAIL SKILLS

12-42. Message Strategies: Requests for Action [LO-2] You appreciate how important phones are to your company's operations, but the amount of conversational chatter in your work area has gotten so bad that it's hard to concentrate on your work. You desperately need at least a few quiet hours every day to engage in the analytical thinking your job requires.

Your task: Write an email message to the division vice president, Jeri Ross, asking her to designate one of the conference rooms as a quiet-zone workroom. It would have Wi-Fi so that employees can stay connected to the corporate network, but it would not have any phone service, either landline or mobile. (Mobile reception is already weak in the conference rooms, but you will propose to equip the room with a mobile signal jammer to ensure that no calls can be made or received.) In addition, conversation of any kind would be strictly forbidden. Make up any details you need.

EMAIL SKILLS/MOBILE SKILLS

12-43. Message Strategies: Requests for Action [LO-2] Your new company, WorldConnect Language Services, started well and is going strong. To expand beyond your Memphis, Tennessee, home market, you need a onetime infusion of cash to open branch offices in other cities around the Southeast. At a lunch forum sponsored by the Angel Investment Network (www.angelinvestmentnetwork.us), you learned about several angels, as they are called in the investment community—private individuals who invest money in small companies in exchange for a share of ownership. One such angel, Melinda Sparks, told the audience she is looking for investment opportunities outside of high technology, where angels often invest their money. She also indicated that she looks for entrepreneurs who know their industries and markets well, who are passionate about the value they bring to the marketplace, who are committed to growing their businesses, and who have a solid plan for how they will spend an investor's money. Fortunately, you meet all her criteria.

Your task: Draft an email message to Sparks introducing yourself and your business and asking for a meeting at which you can present your business plan in more detail. Explain that your Memphis office was booked to capacity within two months of opening, thanks to the growing number of international business professionals looking for translators and interpreters. You've researched the entire Southeast region and identified at least 10 other cities that could support a language services office such as yours. Making up whatever other information you need, draft a four-paragraph message following the AIDA model, ending with a request for a meeting within the next four weeks. You know Sparks tends to read email on her phone, so craft your message to be mobile friendly.

EMAIL SKILLS

12-44. Message Strategies: Persuasive Claims and Requests for Adjustment [LO-2] You thought it was strange that no one called you on your new mobile phone, even though you had given your family members, friends, and boss your new number. Two weeks after getting the new phone and agreeing to a $49 monthly fee, you called the service provider, InstantCall, just to see if everything was working. Sure enough, the technician discovered that your incoming calls were being routed to an inactive number. You're glad she found the problem, but then it took the company nearly two more weeks to fix it. When you called to complain about paying for service you didn't receive, the customer service agent suggests you send an email to Judy Hinkley at the company's regional business office to request an adjustment.

Your task: Decide how much of an adjustment you think you deserve under the circumstances and then send an email message to Hinkley to request the adjustment to your account. Write a summary of events in chronological order, supplying exact dates for maximum effectiveness. Make up any information you need, such as problems that the malfunctioning service caused at home or at work.

LETTER-WRITING SKILLS

12-45. Message Strategies: Requests for Information [LO-2] As a motivated, ambitious employee, you naturally care about your performance on the job—and about making sure your performance is being fairly judged and rewarded. Unfortunately, the company has gone through a period of turmoil over the past several years, and you have reported to seven managers during the past five years. One year, your annual performance review was done by someone who had been your boss for only three weeks and knew almost nothing about you or your work. Last year, your boss was fired the day after he wrote your review, and you can't help but wonder whether you got a fair review from someone in that situation. Overall, you are worried that your career progression and wage increases have been hampered by inconsistent and ill-informed performance reviews.

The company allows employees to keep copies of their reviews, but you haven't been diligent about doing so. You would like to get copies of your last five reviews, but you heard from a colleague that the human resources department will not release copies of past reviews without approval from the managers who wrote them. In your case, however, three of the managers who reviewed you are no longer with the company, and you do not want your current boss to know you are concerned about your reviews.

Your task: Write an email message to the director of human resources, Leon Sandes, requesting copies of your performance reviews over the past five years. Use the information included above and make up any additional details you need.

Marketing And Sales Messages: Conventional Media

LETTER-WRITING SKILLS/PORTFOLIO BUILDER

12-46. Message Strategies: Marketing and Sales Messages [LO-3] Like all other states, Kentucky works hard to attract businesses that are considering expanding into the state or relocating entirely from another state. The Kentucky Cabinet for Economic Development is responsible for reaching out to these companies and overseeing the many incentive programs the state offers to new and established businesses.

Your task: As the communication director of the Kentucky Cabinet for Economic Development, you play the lead role in reaching out to companies that want to expand or relocate to Kentucky. Visit **www.thinkkentucky.com** and read "Top 10 Reasons for Locating or Expanding Your Business in Kentucky" (look under "Why Kentucky"). Identify the major benefits the state uses to promote Kentucky as a great place to locate a business. Summarize these reasons in a one-page form letter that will be sent to business executives throughout the country. Be sure to introduce yourself and your purpose in the letter, and close with a compelling call to action (have them reach you by telephone at 800-626-2930 or by email at econdev@ky.gov). As you plan your letter, try to imagine yourself as the CEO of a company and consider what a complex choice it would be to move to another state.[23]

LETTER-WRITING SKILLS/ PORTFOLIO BUILDER

12-47. Message Strategies: Marketing and Sales Messages [LO-3] Water polo is an active sport that provides great opportunities for exercise and for learning the collaborative skills involved in teamwork. You can learn more at www.usawaterpolo.org.

Your task: Write a one-page letter to parents of 10- to 14-year-old boys and girls promoting the health and socialization benefits of water polo and encouraging them to introduce their children to the sport through a local club. Tell them they can learn more about the sport and find a club in their area by visiting the USA Water Polo website.

WEB-WRITING SKILLS

12-48. Message Strategies: Marketing and Sales Messages [LO-3] Convincing people to give their music a try is one of the toughest challenges new bands and performers face.

Your task: Imagine you've taken on the job of promoting an amazing band or performer you just discovered, such as Sam Fender, Another Sky, or Anteros. Choose someone you've heard live or online and write 100 to 200 words of webpage copy describing the music in a way that will convince people to listen to a few online samples.

MOBILE SKILLS/TEAM SKILLS/PORTFOLIO BUILDER

12-49. Message Strategies: Marketing and Sales Messages [LO-3] You never intended to become an inventor, but you saw a way to make something work more easily, so you set to work. You developed a model, found a way to mass-produce it, and set up a small manufacturing studio in your home. You know that other people are going to benefit from your invention. Now all you need to do is reach that market.

Your task: Team up with other students assigned by your instructor and imagine a useful product that you might have invented—perhaps something related to a hobby or sporting activity. List the features and benefits of your imaginary product, and describe how it helps customers. Then write the copy for the first screen of a mobile-friendly website that would introduce and promote this product, using what you've learned in this chapter and making up details as you need them. Using word-processing software or another tool if your instructor indicates, format the screen to show how the information would appear on a typical smartphone screen.

PODCASTING SKILLS

12-50. Message Strategies: Marketing and Sales Messages [LO-3] Your new podcast channel, School2Biz, offers advice to business students making the transition from college to career. You provide information on everything from preparing résumés to interviewing to finding a place in the business world and building a successful career. As you expand your audience, you'd eventually like to turn School2Biz into a profitable operation (perhaps by selling advertising time during your podcasts). For now, you're simply offering free advice.

Your task: Write a 50- to 75-word description of your new podcast that could appear in TuneIn's podcast library (**tunein.com/podcasts**). Make up any information you need to describe School2Biz. Be sure to mention who you are and why the information you present is worth listening to.

Marketing And Sales Messages: Social Media

SOCIAL NETWORKING SKILLS/ TEAM SKILLS

12-51. Message Strategies: Marketing and Sales Messages; Media Skills: Social Networking [LO-3], Chapter 8 You chose your college or university based on certain expectations, and you've been enrolled long enough now to have some idea about whether those expectations have been met. In other words, you are something of an expert about the "consumer benefits" your school can offer prospective students.

Your task: In a team of four students, interview six other students who are not taking this business communication course. Try to get a broad sample of demographics and psychographics, including students in a variety of majors and programs. Ask these students (1) why they chose this college or university and (2) whether the experience has met their expectations so far. To ensure the privacy of your respondents, do not record their names with their answers. Each member of the team should then answer these same two questions, so that you have responses from a total of 10 students.

After compiling the responses (you might use Google Docs or a similar collaboration tool so that everyone on the team has easy access to the information), analyze them as a team to look for any recurring "benefit themes." Is it the quality of the education? Research opportunities? Location? The camaraderie of school sporting events? The chance to meet and study with fascinating students from a variety of backgrounds? Identify two or three strong benefits that your college or university can promise—and deliver—to prospective students.

Now nominate one member of the team to draft a short marketing message that could be posted on your school's Facebook page. The message should include a catchy title that makes it clear the message is a student's perspective on why this is a great place to get a college education. When the draft is ready, the other members of the team should review it individually. Finally, meet as a team to complete the message.

MICROBLOGGING SKILLS

12-52. Message Strategies: Marketing and Sales Messages; Media Skills: Microblogging [LO-3], Chapter 8 Effective microblogging messages emphasize clarity and conciseness—and so do effective sales messages.

Your task: Find the any maker/crafts product that interests you from Adafruit (**www.adafruit.com**), Michaels (**www.michaels.com**), or Lie-Nielsen Toolworks (**www.lie-nielsen.com**). Adapt the information on the website to write four tweets to promote the product. The first should get your audience's attention, the second should build audience interest by providing some support for the claim you made in the first message, the third should increase readers' desire to have the product by layering on one or two more buyer benefits, and the fourth should motivate readers to take action to place an order. Leave 23 characters in the final tweet for the URL.

If your class is set up with private Twitter accounts, use your private account to send your messages. Otherwise, email your four messages to your instructor or post them on your class blog, as your instructor directs.

SOCIAL NETWORKING SKILLS/TEAM SKILLS

12-53. Message Strategies: Marketing and Sales Messages; Media Skills: Social Networking [LO-3], Chapter 8 At this point in your collegiate career, you've developed areas of academic expertise that could benefit other students. After kicking around moneymaking ideas with friends, you decide that the tutoring business would be a more enjoyable way to share your expertise than a regular part-time job.

Your task: In a team assigned by your instructor, compile a list of all the subject areas in which your team would be qualified to tutor high school students or other college students. Then brainstorm the best way to present your offerings through Facebook and other social media. Come up with a name for your tutoring company and write a 100- to 200-word "About Us" statement.

MICROBLOGGING SKILLS/TEAM SKILLS

12-54. Message Strategies: Marketing and Sales Messages; Media Skills: Social Networking [LO-3], Chapter 8 You and your tutoring team (see the previous case) know you should take advantage of every social media platform to inform potential clients about your new company.

Your task: With the same team as in the previous case, compose four tweets to introduce your tutoring service on Twitter. Allow enough room in one of the tweets to include a URL (23 characters). Submit the tweets to your instructor in whatever format he or she requests.

Five-Minute Guide to Writing Persuasive Messages

Before you start a persuasive business message or a promotional (marketing or sales) message, review these helpful tips.

00:01

Plan the message

1. Gather as much information as you can about your audience members and their needs.
2. Identify what is likely to motivate readers or listeners to respond to a message such as yours.
3. Make sure you have distilled your main idea down to a single, concise promise of how your offer can help your audience.
4. The indirect approach is often the better choice for persuasive messages, but you may encounter situations in which the direct approach is more effective.

00:02

Choose an effective strategy

1. Frame your arguments; the AIDA model and its variants are ideal for many persuasive messages:
   - Open with an intriguing promise that gets the audience's **attention**.
   - Provide additional details to build **interest**.
   - Help readers and listeners embrace the possibility and thereby build **desire**.
   - End with a call to **action**.
2. Balance the three types of persuasive appeals:
   - Ethos—the ethical dimension, including how much credibility you have with the audience
   - Pathos—appeals to emotion
   - Logos—argumentation based on logic and evidence
   - All messages need an ethical foundation, and the right mix of emotional and logical appeals depends on the situation.
3. Reinforce your position; use additional evidence and thoughtful language choices to make your appeal even stronger.
4. Anticipate objections; try to "preaddress" potential objections by answering them in your initial message.

00:03

Avoid these common mistakes

1. Using a hard sell; nobody likes to be pushed into a decision.
2. Resisting compromise; look for win-win outcomes.
3. Relying solely on great arguments; connect with your audience at an emotional level.
4. Assuming that persuasion is a one-shot effort; you may need to send several messages in sequence to achieve a desired outcome.

00:04

Follow these tips for marketing and sales messages

1. Remember that marketing messages usher potential buyers through the purchasing process without asking them to make an immediate decision; then sales messages take over, encouraging people to make a purchase decision.
2. Be sure to identify key selling points (the most attractive features of a product) and the benefits they can deliver to customers.
3. In social media, minimize overt promotion and focus on having a conversation with target customers and influencers.

00:05

Keep an eye on ethical and legal issues

1. With any kind of persuasive message, never resort to deception or other unethical behaviors.
2. For marketing and sales messages, be aware of the many regulations that govern these types of messages.

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PART 5

Reports and Proposals

CHAPTER 13 Finding, Evaluating, and Processing Information

CHAPTER 14 Planning Reports and Proposals

CHAPTER 15 Writing and Completing Reports and Proposals

Reports and proposals are the tools you use to analyze complex problems, educate audiences, address opportunities in the marketplace, win contracts, and even launch new companies through compelling business plans. Adapt what you've learned so far to the challenges of these long-format messages, including some special touches that can make formal reports stand out from the crowd.



Klaus Vedfelt/Taxi/Getty Images

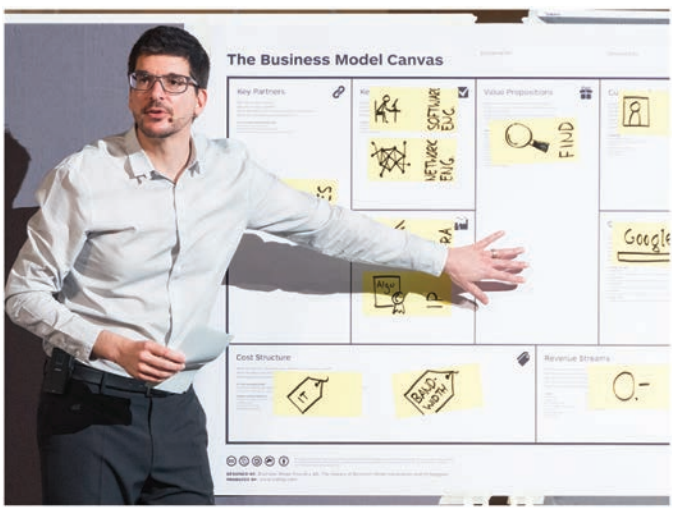
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13 Finding, Evaluating, and Processing Information

LEARNING OBJECTIVES

After studying this chapter, you will be able to

1. Describe an effective process for conducting business research.
2. Define *secondary research*, and explain how to evaluate, locate, and document information sources.
3. Define *primary research*, and outline the steps involved in conducting surveys and interviews.
4. Describe the major tasks involved in processing research results.
5. Explain how to summarize research results and present conclusions and recommendations.



Courtesy of Alex Osterwalder

Author and entrepreneur Alex Osterwalder's approach to evaluating new business ideas offers a simpler, faster alternative than the traditional business plan.

COMMUNICATION CLOSE-UP AT
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Whenever you're gathering information for a major business writing project, you're likely to encounter the question of how much is enough? Collecting and processing information takes time and often costs money, and it's not always clear how much information you need to craft an effective report or proposal, or how much time and money you should invest to get it. Invest too little and you risk writing a flawed report. Invest too much and you'll waste time and money that would be better put to other uses. Business plans are a great example of this dilemma, and the Swiss company Strategyzer is making waves in the global entrepreneurial community with an unconventional approach to collecting information for such plans.

As you'll read on page 403 in Chapter 14, a conventional business plan covers a lot of territory, from a high-level look at strategy to details on financing, operations, marketing, and other functional areas. These reports can run to 20, 30, 40 pages or more, and writers can spend weeks gathering the necessary information and distilling it down to useful formats.

Spending that much time on research before writing the business plan and launching the company can seem like a good idea to entrepreneurs who want to reduce start-up risks as much as possible or who want to produce high-quality reports to impress lenders or investors. In many start-up situations, however, this is precious time that entrepreneurs should be spending getting a product in front of customers to test the viability of the business concept rather than crafting an impressive-looking plan about an idea that is still unproven. Moreover, in fast-moving markets, it is possible to spend so much time researching and writing the business plan that the target market changes by the time the plan is ready.

In addition, business plans have a special twist that involves the uncertainty surrounding some of the most important information they typically contain. For example, estimating demand for a new product or service is one of the most vital aspects of planning a business—and one of the most difficult. You might spend weeks or months gathering data on comparable products and refining spreadsheets with elegant forecasting models to predict how many products you can sell and how much profit you'll make. This projection will then be the basis of almost everything else in the business plan, from the amount of money you can attract from investors to the number of employees you should hire.

Here's the catch: You could spend weeks or months writing a plan and launching a business based on this number only to find out it's wildly off the mark. In the worst case scenario, you might have wasted months launching a weak business idea or a product with little or no market appeal. Even the most sophisticated estimates of market demand are still only predictions, and the only way to really know if a product is going to sell is to get it in front of customers and ask them to buy it.

In response to these uncertainties with conventional business plans, some experts now recommend a simplified, accelerated approach that gets a new business to the "point of proof" faster. One of the key thinkers behind this new approach is Strategyzer's co-founder, business theorist Alex Osterwalder. Rather than launching businesses with elaborate planning and a conventional business plan, he proposes that companies use the Business Model Canvas. This single-sheet visual brainstorming tool helps entrepreneurs answer a handful of key questions to determine whether they have a financially viable business concept—and what to adjust if they don't. The canvas approach helps flag some of the common stumbling points of new businesses, including financial plans that are based on shaky assumptions (or outright fantasy) and untested hypotheses about market behavior.

The Business Model Canvas and its variants don't necessarily replace conventional business reports in all cases, and they don't cover all the details needed to operate a business after launch, but they help entrepreneurs decide whether it makes sense to move forward. By developing and testing business concepts quickly, entrepreneurs can find out whether they have a realistic idea before investing weeks of time in detailed planning and report-writing efforts. The canvas idea has definitely captured the imagination of entrepreneurs: More than a million people bought the book that first outlined the canvas idea, and more than 5 million have downloaded the software tool offered by Strategyzer.[1]

Planning Your Research

1 LEARNING OBJECTIVE

Describe an effective process for conducting business research.

Readers expect you to support your business messages with solid research.

Whether you're brainstorming a new business idea using something like Strategyzer's Business Model Canvas (profiled in the chapter-opening Communication Close-Up) or planning a conventional business report or proposal, you need to make sure your reporting, analysis, and recommendations are supported with solid research. Figure 13.1 outlines a five-step research process that will help you gather and use information efficiently; you'll learn more about these steps in the following sections.

With so much information now online, it's tempting just to punch some keywords into a search engine and grab the first few results that show up. Effective and efficient research requires a more thoughtful approach. Your favorite search engine might not be able to reach the webpages that have the information you need, the information might not be online at all, it might be online but not under the search terms you've used, or it might not exist in any form.

Researching without a plan can waste time and produce flawed results.

To maximize your chances of finding useful information and to minimize the time you spend looking for it, follow these planning steps: Familiarize yourself with the subject so that you can frame insightful questions, identify the most critical gaps in your information, and then prioritize your research needs. However, before launching any research project, be sure to take a moment or two to consider the ethics and etiquette of your approach.

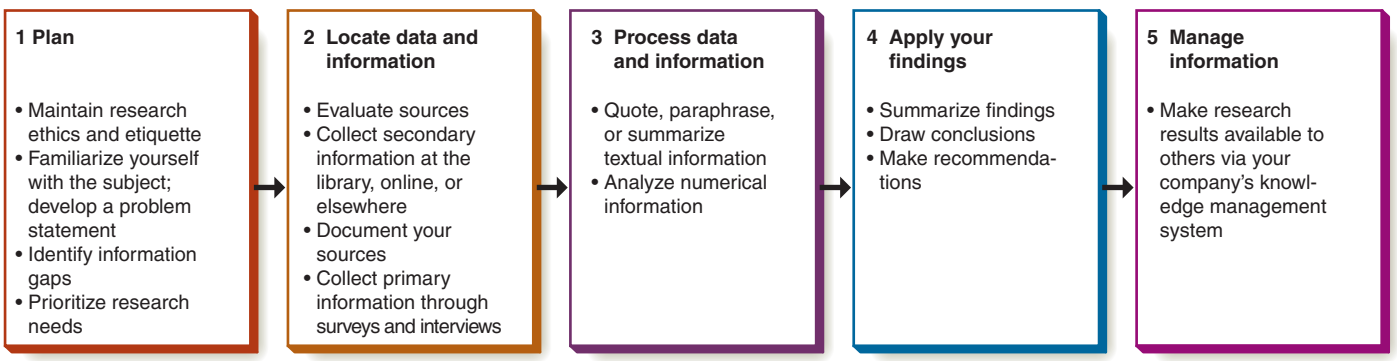


Figure 13.1 The Research Process
By following a methodical research process, you can save time and money while uncovering better information.

MAINTAINING ETHICS AND ETIQUETTE IN YOUR RESEARCH

Your research tactics can affect the people you gather data and information from, and your research results can have wide-ranging effects inside and outside your company. To avoid ethical lapses, keep the following points in mind:

Take precautions to avoid ethical lapses in your research.

- **Don't force a specific outcome by skewing your research.** Approach your research with an open mind and a willingness to accept whatever you find, even if it's not what you expect or want to see.
- **Respect the privacy of your research participants.** Privacy is a contentious issue today. Businesses believe they have a right to protect their confidential information from competitors, and consumers believe they have a right to protect their personal information from businesses.

You must take care to respect the privacy of research participants.

- **Document sources and give appropriate credit.** Whether you are using published documents, personal interviews, or company records, citing your sources not only is fair to the people who created and provided the information but also helps your audience members confirm your information or explore it in more detail, if they so choose.
- **Respect the intellectual property and digital rights of your sources.** For example, your research might turn up a great new way to sell services online, but that doesn't mean you're free to implement that process. It might be protected by one of the many patents that have been granted in recent years for business process models.

Don't automatically assume that you can use all the ideas and information you find online.

- **Don't extract more from your sources than they really provide.** In other words, don't succumb to the temptation to put words in a source's mouth. For instance, if an industry expert says that a sales increase is possible, don't quote him or her as saying that a sales increase is probable.
- **Don't misrepresent who you are or what you intend to do with the research results.** One classic example of ethical lapses in this area is known as *sugging*, short for *selling under the guise of research*.[2] For example, a firm might seem to be conducting a survey when it is, in fact, using the questions to identify hot sales leads. Another unethical variation on sugging is following up a real survey with sales calls, using information that respondents shared in the belief that they were only participating in a survey.[3]

Research etiquette deserves careful attention, too. For example, respect the time of anyone who agrees to be interviewed or to be a research participant, and maintain courtesy throughout the interview or research process. For more information on research ethics and etiquette, review the *Code of Standards and Ethics for Marketing Research and Data Analytics* published by the Insights Association (www.insightsassociation.org), which represents professional business researchers.

FAMILIARIZING YOURSELF WITH THE SUBJECT

Give yourself some unstructured time at the beginning of the project to explore the general subject area, perhaps by reading industry publications and blogs, searching for trending topics on Twitter, visiting competitors' websites, and interviewing experts within your organization. Scanning the tables of contents and indexes of books on the subject can give you a sense of how a broad subject area is divided into component topics.

Avoid false starts and blind alleys by familiarizing yourself with new subject areas before you start your research.

When you have a basic grasp of the subject area, develop a **problem statement** that defines the problem or purpose of your research—the decision you need to make or the conclusion you need to reach at the end of the process. You may find it easier to phrase the problem as a question, such as "How can we improve customer satisfaction?" or "Does Apple's new TV system pose a competitive threat to us?"

The *problem statement* defines the purpose of your research and guides your investigation.

IDENTIFYING INFORMATION GAPS

Your problem statement frames the purpose of your research, but it doesn't usually tell you what specific information you need to find. Your next task is to dig deeper to discover the *information gaps* that need to be filled through research. You or someone in

Focus your research by identifying the most important gaps in your information.

your company may already have some of the information you need, and you don't want to waste time or money gathering information you already have.

For instance, the question "How can we improve customer satisfaction?" is too vague because many separate factors contribute to customer satisfaction. To get useful information, you would break this topic down into specific issues, such as product reliability and customer service skills. Digging further, you may discover that you don't need to research product reliability because the company already tracks data on product repairs. On the other hand, if no one has ever measured the employees' customer service skills, you would identify that as a definite information gap.

PRIORITIZING RESEARCH NEEDS

You usually won't have enough time or money to answer every question that comes to mind, so setting priorities is a must.

Prioritizing your research needs is important because you won't have the time or money to answer every question you might have. Moreover, if you'll be using interviews or surveys, you'll need to limit the number of questions you ask so that you don't consume more time than people are willing to give. One simple way to prioritize is to divide your questions into "need to know" and "nice to know" and then toss out all the "nice to know" questions. If you start with a technique such as information gap analysis, you will get a clear idea of the information you truly need to collect.

Conducting Secondary Research

2 LEARNING OBJECTIVE
Define *secondary research*, and explain how to evaluate, locate, and document information sources.

Secondary research efforts gather and analyze information that has been previously collected for other purposes.

Start your research by conducting secondary research first.

With a clear plan and careful prioritization, you're ready to conduct research, and the first step is to see whether anyone else has already done some or all the research you need. Consulting research that was done previously for another purpose is considered **secondary research**. The sources for such information include print and online periodicals, online databases, books, and other research reports. (Some companies specialize in reports on particular industries, companies, technologies, market regions, and other subjects.)

Don't let the name *secondary* mislead you, though. You want to start with secondary research because it can save you considerable time and money, although you may have to pay to see someone else's results. In contrast, *primary research* (see page 381) is new research done specifically for the current project.

EVALUATING SOURCES

Evaluate your sources carefully to avoid embarrassing and potentially damaging mistakes.

No matter where you're searching, it is your responsibility to separate quality information from biased material or unreliable junk to avoid tainting your results. Social media tools have complicated this challenge by making many new sources of information available. On the positive side, independent sources communicating through blogs, Twitter, wikis, user-generated content sites, and podcasting channels can provide valuable and unique insights, often from experts whose voices might never be heard otherwise. On the negative side, these nontraditional information sources often lack the editorial boards and fact-checkers commonly used in traditional publishing. You cannot assume that the information you find in blogs and other sources is accurate, objective, and current. Answer the following questions about each piece of material:

- **Does the source have a reputation for honesty and reliability?** Generally speaking, you can feel more comfortable using information from an established source that has a reputation for accuracy. For sources that are new or obscure, your safest bet is to corroborate anything you learn with information from several other sources.
- **Is the source potentially biased?** To interpret an organization's information, you need to know its point of view. For example, information about a company can be presented quite differently by a competitor, a union trying to organize the company's workforce, an investment research firm, and an environmental advocacy group.

MOBILE APP
The **Instapaper** mobile app lets you instantly save webpages and articles to read later, a convenient capability when you're exploring a topic and want to collect potential sources for review.

Information from a source with a distinct point of view isn't necessarily bad, of course, but knowing this context is always helpful and sometimes essential for interpreting the information correctly.

- **What is the purpose of the material?** For instance, was the material designed to inform others of new research, advance a political position, or promote a product? Be sure to distinguish among advertising, advocating, and informing. And don't lower your guard just because an organization has a reassuring name like the American Institute for the Protection of All Things Good and Wonderful; many innocuously labeled groups advocate a particular line of political, social, or economic thinking.
- **Is the author credible?** Is the author a professional journalist, a subject-matter expert, or merely someone with an opinion? What other work has this writer published?
- **Where did the source get *its* information?** Many sources of secondary information get their material from other secondary sources, removing you even further from the original data.
- **Can you verify the material independently?** Verification can uncover biases or mistakes, which is particularly important when the information goes beyond simple facts to include projections, interpretations, and estimates. If you can't verify critical information, let your audience know that.
- **Is the material current and complete?** Make sure you are using the most current information available by checking the publication date of a source. Look for a "posted on" or "updated on" date with online material. If you can't find a date, don't assume the information is current without verifying it against another source. Also, make sure you have evaluated the entire source document, not just a part of it.
- **Are all claims supported with evidence?** Are opinions presented as facts? Does the writer make broad claims, such as "It is widely believed that . . ." without citing any surveys to support this?
- **Does the information make sense?** Finally, step back and ask whether the information makes sense. If that little voice in your head says something feels suspicious, pay attention to it.

Let your readers know if you were unable to verify critical pieces of information obtained in your research.

You probably won't have time to conduct a thorough background check on all your sources, so focus your efforts on the most important or most suspicious pieces of information.

LOCATING SOURCES

Even if you intend to eventually conduct primary research, start with a review of any available secondary research. Inside your company, you might be able to find a variety of documents prepared for other projects that offer helpful information. Be sure to ask whether your company has a *knowledge management system* or some other repository for research results.

Outside the company, you can choose from a wide range of print and online resources. A huge array of directories, databases, and other resources are published on every business topic imaginable. Some of these you can access with a free online search, but others require subscriptions or memberships in an organization.

Finding Information at the Library

Public, corporate, and university libraries offer printed sources with information that is not available online as well as online sources that are available only by subscription. For entrepreneurs and small-business owners in particular, local libraries can provide access to expensive databases and other information sources that would be beyond their reach otherwise.[4]

Libraries are also where you'll find one of your most important resources: librarians. Reference librarians are skilled in research strategies and can often help you locate obscure information you can't find on your own. They can also direct you to many sources of business information. Also, many library websites now have a business portal, with links to helpful resources and advice on finding information.

Libraries offer information and resources you can't find anywhere else—including research librarians who can show you how to plan and conduct effective searches.

Whether you're looking for information in printed materials or in databases, each type of resource serves a special function:

- **Newspapers and periodicals.** Libraries offer access to a wide variety of popular magazines, general business magazines, *trade journals* (which provide information about specific professions and industries), and *academic journals* (which provide research-oriented articles from researchers and educators). Check the library's website or ask a librarian to find out which periodicals are available in print or digital formats.
- **Business books.** Although generally less timely than newspapers, periodicals, and online sources, business books provide in-depth coverage of a variety of business topics.
- **Directories.** Thousands of directories are published in print and digital formats in the United States, and many include information for all kinds of professions, industries, and special-interest groups.
- **Almanacs.** Almanacs are handy guides to factual and statistical information about countries, politics, the labor force, and so on.

Local, state, and federal government agencies publish a huge variety of information that is helpful to business researchers.

- **Government publications and statistical resources.** Information on laws, court decisions, tax questions, regulatory issues, and other governmental concerns is often available in collections of government documents. In addition, state and federal government agencies compile data on many subjects that can be valuable to business researchers.
- **Databases.** Databases offer vast collections of searchable information, often in specific areas, such as business, law, science, technology, and education. Some of these are available only by institutional subscription, so the library may be your only way to gain access to them. Some libraries offer remote online access to some or all databases; for others, you need to visit in person.

Finding Information Online

Online research tools can be used to search for existing information and to monitor for new information.

The internet can be a tremendous source of business information, if you know how to formulate a search, where to look, and how to use the tools available. Roughly speaking, the tools fall into two categories: those you can use to actively *search* for existing information and those you can use to *monitor* selected sources for new information. (Some tools can perform both functions.)

Online Search Tools

Search engines are online tools that index millions of webpages to identify those that contain specific words or phrases.

The most familiar search tools are general-purpose **search engines**, such as Google and Bing, which scan millions of websites to identify individual webpages that contain a specific word or phrase and then apply artificial intelligence and other techniques to rank the results based on relevancy or currency. Website owners use *search engine optimization* techniques to help boost their rankings in the results, but the ranking algorithms are kept secret to prevent unfair manipulation of the results.

Today's search engines are powerful tools, but they still have important limitations.

For all their ease and power, conventional search engines have three primary shortcomings: (1) no human editors are involved to evaluate the quality or ranking of the search results; (2) various engines use different search techniques, so they can find different material or present similar results in different order; and (3) search engines can't reach all the content on some websites (this part of the internet is sometimes called the *hidden internet* or the *deep web*).

Metasearch engines can save you time by using multiple search engines at once.

A variety of tools are available to overcome these weaknesses of general-purpose search engines, and you should consider one or more of them in your business research. **Metasearch engines** help overcome the differences among search engines by formatting your search request for multiple search engines, making it easy to find a broader range of results. With a few easy steps, you can compare results from multiple search engines to make sure you are getting a broad view of the material.

Online databases give you access to some of the most important resources that search engines usually can't reach: millions of newspaper, magazine, and journal articles.

A wide variety of online databases help address the challenge of the hidden internet by offering access to newspapers, magazines, journals, digital copies of books, and other

resources often not available with standard search engines. Some of these databases offer free access to the public, but others require a subscription (check with your library).

Online Monitoring Tools

To catch the latest news on a research topic, you can set up a variety of monitoring tools.

One of the most powerful aspects of online research is the ability to automatically monitor selected sources for new information so that you can get new information without repeating manual searches. The possibilities include subscribing to newsfeeds from blogs and websites, following people on Twitter and other social media sites, setting up alerts on search engines, and using specialized monitors such as TweetDeck and HootSuite to track tweets that mention specific companies or other terms.

Exercise care when setting up monitoring tools, however, because it's easy to get overwhelmed by the flood of information. Remember that you can always go back and search your sources if you need to gather additional information.

Search Tips

Make sure you know how each search tool works; you can get unpredictable results if you don't know how each tool operates.

Search engines, metasearch engines, and databases offer a variety of ways to find information. Unfortunately, no two of them work in exactly the same way, and you must learn how to use each one most effectively. This learning may take a few extra minutes at the beginning of your research, but it could save you hours of lost time later—and save you from embarrassing oversights. You can usually find a Help or Support page that explains both basic and advanced functions, with advice on how to use each tool most effectively.

To make the best use of any search engine or database, keep the following points in mind:

Contrary to the illusion that search engine results can create, the internet is not a complete, well-organized warehouse of reliable information.

- **Think before you search.** The neatly organized results you get from a search engine can create the illusion that the internet is an orderly warehouse of all the information in the universe, but the reality is far different. The internet is an incomplete, unorganized hodgepodge of millions of independent websites with information that ranges in value from priceless to worse than worthless. After you have identified what you need to know, spend a few moments thinking about where that information might be found, how it might be structured, and what terms various websites might use to describe it.
- **Pay attention to the details.** Details can make all the difference in a search. On Google, for example, you can filter results according to when items were published. This setting could drastically change your results, so make sure you haven't inadvertently limited your search by selecting a narrower time frame than you really want.
- **Don't limit yourself to a regular web search engine.** Google, Bing, and other search engines are remarkably powerful, but they can't access all online content. Moreover, the content you need might not even be online.

Review search and display options to make sure you understand how a search engine or data is searching for and displaying results.

- **Review the search and display options carefully.** When using advanced search or while searching in databases, pay close attention to whether you are searching in the title, author, subject, or document field and whether the search is limited to particular types of documents (such as full-text documents only). Each choice will return different results. And when the results are displayed, verify the presentation order; results might be sorted by date or by relevance.
- **Try variations of terms.** If you can't find what you're looking for, try abbreviations (*CEO, CPA*), synonyms (*man, male*), related terms (*child, adolescent, youth*), different spellings (*dialog, dialogue*), singular and plural forms (*woman, women*), nouns and adjectives (*manager, management, managerial*), and open and compound forms (*online, on line, on-line*).
- **Adjust the scope of your search, if needed.** If a search yields little or no information, broaden your search by specifying fewer terms. Conversely, if you're inundated with too many hits, use more terms to narrow your search.
- **Review the features each search tool offers.** For example, some systems will show you similar search terms that other people have used, which can help you explore a topic by considering angles you haven't thought of.

Be sure to look beyond the first few pages of search results; there is no guarantee that the best information for your project will appear early in the listings.

- **Look beyond the first few pages of results.** Don't assume that the highest-ranking results are the best sources for you. For example, materials that haven't been optimized for search engines won't rank as highly (meaning they might not show up in the first few pages of results), but they may be far better for your purposes.

Search technologies continue to evolve rapidly, so be on the lookout for new ways to find the information you need. Again, librarians can be your best ally here.

MOBILE APP
Access and add to your Zotero research files with a variety of **Zotero**-compatible mobile apps.

Other powerful search tools include *enterprise search engines* that search all the computers on a company's network and *research and content managers* such as LiveBinders and the Zotero browser extension. And don't overlook the search functions in workplace messaging systems, groupware, and other closed systems.

As you plan your research, look for ways to take advantage of mobile devices and apps—they have become powerful tools for business research. For example, you can use them to conduct mobile surveys, take notes, make sketches, take photos, capture audio or video, and scan documents. Of course, you need to pay attention to ethical and legal concerns, such as not violating anyone's privacy or recording confidential information.

DOCUMENTING YOUR SOURCES

Proper documentation of the sources you use is an ethical responsibility—and an important resource for your readers.

Documenting the sources you use in your writing serves three important functions: It properly and ethically credits the person who created the original material, it shows your audience that you have sufficient support for your message, and it helps your readers explore your topic in more detail, if desired. Your results might be used by people long after you conduct the research, and these people won't always be able to query you in person for more information.

Be sure to take advantage of source documentation tools whenever you can to help ensure that you accurately track all your sources. Most word-processing software can automatically track and number endnotes for you, and you can use the "table of authorities" feature to create a bibliography of all the sources you've used. A wide variety of *citation management* or *reference management* tools are available with popular web browsers.

You may document your sources through footnotes, endnotes, or some similar system (see Appendix B, "Documentation of Report Sources"). Whatever method you choose, documentation is necessary for books, articles, tables, charts, diagrams, song lyrics, scripted dialogue, letters, speeches, and anything else you take from someone else, including ideas and information that you've re-expressed through paraphrasing or summarizing.

You do not have to cite a source for general knowledge or for specialized knowledge that's generally known among your readers. For example, almost everyone knows that Nike is a large sporting goods company and that computers are pervasive in business today. You can say so on your own authority, even if you've read an article in which the author says the same thing.

Copyright protections may prevent you from using some materials without obtaining permission from the copyright holder.

Chapter 1 notes that copyright law covers the expression of creative ideas, and copyrights can apply to a wide range of materials, including reports and other documents, web content, movies, musical compositions, lectures, computer programs, and even choreographed dance routines. Copyright protection is initiated the moment the expression is put into fixed form. Copyright law does not protect such elements as titles, names, short phrases, slogans, familiar symbols, or lists of ingredients or contents. It also doesn't protect ideas, procedures, methods, systems, processes, concepts, principles, discoveries, or devices, although it does cover their description, explanation, or illustration.[5] However, many entities that aren't covered under copyright law are covered under other legal protections, such as trademarks for slogans and patents for devices and processes.

If you want to use copyrighted information in a publication, contact the copyright holder (usually the author or publisher) for permission to reprint it. You may be asked to pay a fee. For more information on copyrights, visit **www.copyright.gov** or **www.creativecommons.org**.

Conducting Primary Research

3 LEARNING OBJECTIVE
Define *primary research*, and outline the steps involved in conducting surveys and interviews.

If secondary research can't provide the information and insights you need, your next choice is to gather the information yourself. This is the task of **primary research**, which is collecting data and information for the first time, rather than analyzing and reusing what other researchers have found. The two most common primary research methods for business writing are surveys and interviews, the focus of this section. Other primary techniques include *observation* and *experiments*, such as test-marketing a new product.

Primary research efforts collect data and information for the first time rather than analyzing and reusing what other researchers have found.

With surveys and interviews, you can choose from a variety of questions types, but all fall into two general categories. **Closed-ended questions** restrict the responses to a predetermined set or range of answers. Yes/no and multiple-choice questions are common examples of this category. Closed-ended questions are usually easier for participants to answer and are easier for researchers to compile and analyze because all the answers are in the same format. However, they can't always "dig down" to get complex insights or uncover information that the researchers didn't know about.

A *closed-ended question* has a predetermined set of answer choices.

Open-ended questions give respondents the freedom to provide whatever information they choose to share and in any amount. (You've probably heard these referred to as "essay questions" in your school experience.) Open-ended questions are better for soliciting opinions, insights, and any kind of "free-form" information. The disadvantages of these questions are that they require more time and effort to answer and more time and effort to compile and analyze.

An *open-ended question* lets people provide whatever information they would like to provide.

GATHERING INFORMATION WITH SURVEYS

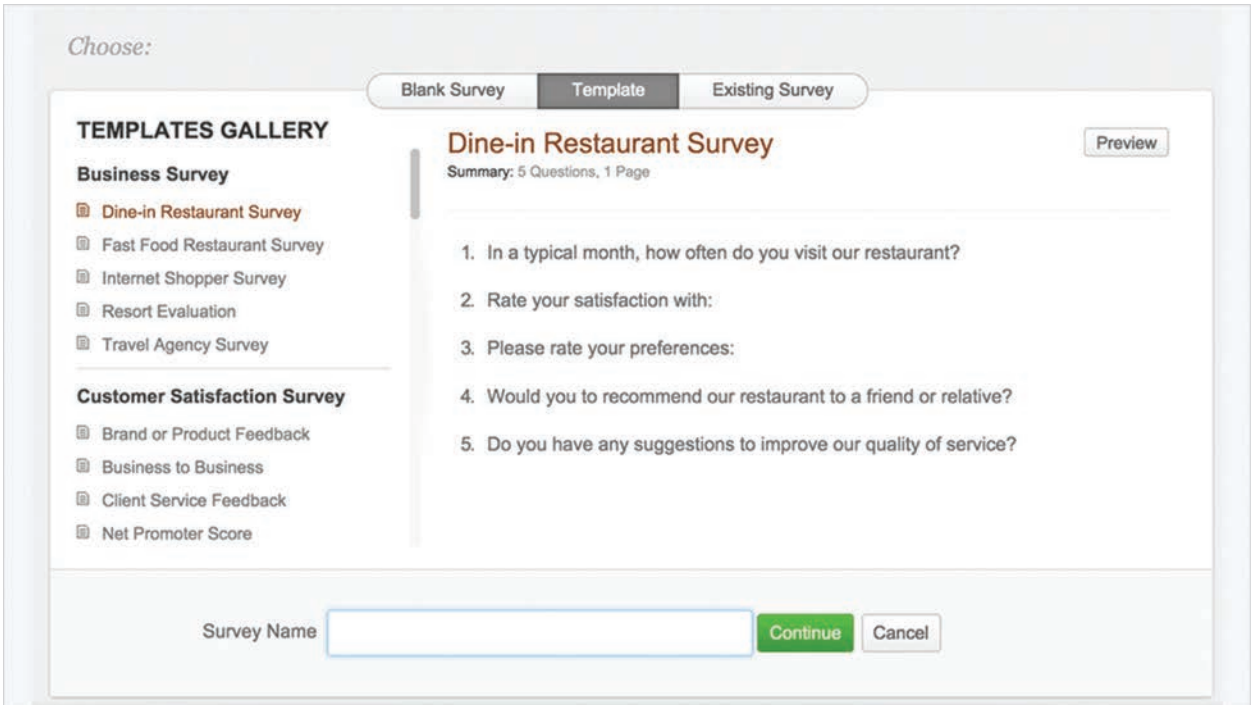
Surveys can provide invaluable insights on a wide variety of business topics, but they are useful only when they're *reliable* and *valid*. A survey is reliable if it produces identical results when repeated. A survey is valid if it measures what it's intended to measure.

To conduct a survey that generates reliable and valid results, you need to choose research participants carefully and develop an effective set of questions. A good research handbook can guide you through the process of selecting a sufficient number of representative participants. For important surveys on strategically important topics with much at stake, you're usually better off hiring a research specialist who knows how to avoid errors during planning, execution, and analysis. Services such as Survey Monkey also have *panels* of survey respondents that researchers can survey for a fee.[6]

When selecting people to participate in a survey, the most critical task is getting a *representative sample* of the population in question. For instance, if you want to know how U.S. consumers feel about something, you can't just survey a few hundred people in a shopping mall. Different types of consumers shop at different times of the day and on different days of the week, and many consumers rarely, if ever, shop at malls. A survey that doesn't represent the overall population will suffer from *sampling bias*. Similarly, a survey posted on a website will obviously gather data only from those people who happen to visit that website while the survey is active.

For a survey to produce valid results, it must be based on a representative sample of the population of interest.

A variety of survey systems are now available, making it easy to create professional-quality surveys that can be answered on a variety of desktop and mobile devices (see Figure 13.2 on the next page).



Courtesy of Zoho Corporation

Figure 13.2 Online and Mobile Survey Tools
Online survey systems such as Zoho Survey make it easy to build professional-quality surveys to gather data on practically any business topic.

To develop an effective survey questionnaire, start with the information gaps you identified earlier and then break these points into specific questions.

Provide clear instructions in questionnaires to prevent incorrect or ambiguous answers.

To develop an effective survey questionnaire, start with the information gaps you identified earlier and then break these points into specific questions, choosing an appropriate type of question for each point. (Figure 13.3 shows various types of survey questions.) The following guidelines will help you produce results that are both valid and reliable:

- Provide clear instructions to make sure people can answer every question correctly.
- Emphasize closed-ended questions, which are generally easier to answer than open-ended questions. Survey Monkey, for example, suggests having no more than two open-ended questions in a survey and putting them at the end so that you still capture all the earlier data if respondents abandon the survey when they reach the open-ended questions.[7]
- Don't ask for information that people can't be expected to remember, such as how many times they went grocery shopping in the past year or how many online ads they saw this week.[8]
- Keep the questionnaire short as short as possible, and let people know approximately how long it will take to complete. Unless you are offering some form of compensation, don't expect people to give you more than 5 or 10 minutes of their time.
- Avoid *leading questions* that could bias your survey. If you ask, "Do you prefer that we stay open in the evenings for customer convenience?" you'll get many "yes" answers simply because that sounds like a positive thing. Instead, ask, "What time of day do you normally do your shopping?"
- Avoid ambiguous descriptors such as *often* or *frequently*. Such terms mean different things to different people.
- Don't force people to answer every question. Doing so can increase the number of people who abandon a survey before completing it.[9]
- Avoid compound questions such as "Do you read books and magazines?" People who read one but not the other won't know whether to answer yes or no.
- Before you conduct a survey, test it on a sample group first to identify questions that might be confusing or ambiguous.

QUESTION TYPE	EXAMPLE
Open-ended	How would you describe the flavor of this ice cream?
Either-or	Do you think this ice cream is too rich? _____ Yes _____ No
Multiple-choice	Which description best fits the taste of this ice cream? (Choose only one.) a. Delicious b. Too fruity c. Too sweet d. Too intense e. Bland f. Stale
Scale	Please mark an X on the scale to indicate how you perceive the texture of this ice cream. Too light — Light — Creamy — Too creamy
Checklist	Which of the following ice cream brands do you recognize? (Check all that apply.) _____ Ben & Jerry's _____ Breyers _____ Carvel _____ Dreyer's _____ Häagen-Dazs
Ranking	Rank these flavors in order of your preference, from 1 (most preferred) to 5 (least preferred): _____ Vanilla _____ Cherry _____ Strawberry _____ Chocolate _____ Coconut
Short-answer	In the past 2 weeks, how many times did you buy ice cream in a grocery store? _____ In the past 2 weeks, how many times did you buy ice cream in an ice cream shop? _____

Figure 13.3 Types of Survey Questions
For each item in your survey, choose the type of question that will elicit the most useful answers.

GATHERING INFORMATION WITH INTERVIEWS

Getting in-depth information straight from an expert or an individual concerned about an issue can be a great method for collecting primary information. Interviews can dig deeper than surveys can, and skilled interviewers can also watch for nonverbal signals that provide additional insights. Interviews can take a variety of formats, from email exchanges to group discussions (see Figure 13.4 on the next page).

Interviews are easy to conduct but require careful planning to produce useful results.

In contrast to surveys, in which you want to emphasize closed-ended question, you should primarily use open-ended questions in interviews. These questions take

In contrast to surveys, you should primarily use open-ended questions in interviews.



Anton Gvozdikov/Shutterstock

Figure 13.4 Research Interviews
Interviews are an excellent way to get in-depth information from subject matter experts or concerned stakeholders. Remember to prepare thoroughly so you can make the best use of the opportunity.

full advantage of the interview format and let you engage the respondent in a more natural, conversation, complete with follow-up questions if you uncover interesting new information. (If you determine that the information you are looking for can be gathered with closed-ended questions, it's better to use a survey instead.)

Think carefully about the sequence of your questions and the subject's potential answers so you can arrange questions in an order that helps uncover layers of information. Also, consider providing the person with a list of questions a day or two before the interview, especially if you'd like to quote your subject in writing or if your questions might require your subject to conduct research or think extensively about the answers.

If you want to record the interview, ask the person ahead of time and respect his or her wishes. During the interview, be alert to new topics you might not have considered while planning the interview, and pursue them if they will shed light on your research questions.

Think carefully about the sequence of questions so that you can uncover layers of information.

As soon as possible after the interview, take a few moments to write down your thoughts, go over your notes, and organize your material. Look for important themes, helpful facts or statistics, and direct quotes. If you recorded the interview, *transcribe* it (take down word for word what the person said) or take notes from the recording just as you would while listening to someone in person.

You may be able to interview people via email if you can't reach them in person or over the phone.

Face-to-face interviews give you the opportunity to gauge reactions to your questions and observe the nonverbal signals that accompany the answers, but interviews don't necessarily have to take place in person. For example, email interviews give subjects a chance to think through their responses thoroughly rather than rush to fit the time constraints of a face-to-face interview. Also, email interviews might be the only way you will be able to access some experts.

In a *focus group*, a moderator guides a group discussion while researchers observe through a one-way mirror.

In addition to individual interviews, business researchers can also use a form of group interview known as the **focus group**. In this format a moderator guides a group through a series of discussion questions while the rest of the research team members observe through a one-way mirror. A key advantage of focus groups is the opportunity to learn from group dynamics as the various participants bounce ideas and questions off each other. For example, if people start to criticize or defend a product or an idea, you might uncover deeper emotional insights than you could hear in solo interviews.

As a reminder of the tasks involved in interviews, see "Checklist: Conducting Effective Information Interviews."

CHECKLIST ✓ Conducting Effective Information Interviews

- Learn about the person you will be interviewing.
- Formulate your main idea to ensure effective focus.
- Choose the duration, style, and organization of the interview.
- Select question types to elicit the specific information you want.
- Design each question carefully to collect useful answers.
- Limit the number of questions you ask.
- During the interview, be alert to new topics that you might want to probe.
- Consider recording the interview if the subject permits.
- Review your notes as soon as the interview ends.

Processing Data and Information

4 LEARNING OBJECTIVES
Describe the major tasks involved in processing research results.

After you've collected all the necessary secondary and primary information, the next step is to transform it into the specific content you need. For simple projects, you may be able to insert your material directly into your report, presentation, or other application. However, when you have gathered a significant amount of information or raw data, you need to process the material before you can use it. This step can involve quoting, paraphrasing, or summarizing textual material; analyzing numeric data; drawing conclusions; and making recommendations. If your company has access to *text mining* tools, you might be able to use these to analyze written material much faster than you could do manually (see Intelligent Communication Technology: Finding Meaning with Text Mining).

After you have collected your research results, the next step is to convert them into usable information.

QUOTING, PARAPHRASING, AND SUMMARIZING

You can use textual information from secondary sources in three ways. *Quoting* a source means you reproduce the material exactly as you found it (giving full credit to the source, of course). Use direct quotations when the original language will enhance your argument or when rewording the passage would reduce its impact. However, be careful with direct quotes: Using too many creates a choppy patchwork of varying styles and gives the impression that all you've done is piece together the work of other people. When quoting sources, set off shorter passages with quotation marks and set off longer passages (generally, five lines or more) as separate, indented paragraphs.

Quoting a source means reproducing the content exactly and indicating who originally created the information.

INTELLIGENT COMMUNICATION TECHNOLOGY

Finding Meaning with Text Mining

You've probably experienced both these frustrations with search engines: You need to find something, but you're not quite sure which terms to use, so you poke around hoping you'll find something, or you get lots of irrelevant results that happen to include your search terms but have nothing to do with what you are looking for.

Text mining, also known as *text analytics*, promises the ability to find meaning and patterns in mountains of textual material by going far beyond conventional search capabilities. Unlike simple word and phrase searches that require exact or near-exact matches, text mining systems can find relevant material even if you don't know the specific terminology the sources use or if they use different words to express the same concepts. By applying linguistic principles through *natural language processing*, text mining systems can recognize meaning in context. This capability also helps text mining tools filter out irrelevant material that uses the same terms, such as excluding material about biological reproduction if you are searching for material about document or file reproduction.

Another major benefit of text mining is the ability to copy all the searched material and reorganize it into consistent records, even if it came from a variety of sources in different formats. For example, a system could be instructed to pull in social media posts, emails, and text messages and "clean" and merge them into a single data set for easier analysis.

Text mining is a potential solution whenever a business needs to analyze hundreds, thousands, or even millions of text records. Examples of current applications include product research and development (such as searching patent records for similar designs), sentiment analysis (finding trends of satisfaction or dissatisfaction in public tweets, customer emails, and other sources), competitive intelligence (finding out what competitors are up to by analyzing their document and social media output), and risk management (such as analyzing financial news and reports in search of potential risks).

WHAT'S YOUR TAKE?

1. Natural language processing applies the same linguistic rules and concepts that humans use to encode and decode language. Do you think computers will ever be able to understand text the way that humans can? Why or why not?
2. How do you feel about your public social media posts being available for companies and other organizations to analyze?

Sources: "About Text Mining," IBM Knowledge Center, accessed 29 April 2019, www.ibm.com; "What Is NLP Text Mining?" Linguamatics, accessed 29 April 2019, www.linguamatics.com; "Text Mining Applications: 10 Examples Today," Expert System, 18 April 2016, www.expertsystem.com.

Paraphrasing is expressing someone else's ideas in your own words.

You can often maximize the impact of secondary material in your own writing by *paraphrasing* it: restating the underlying ideas and information in your own words.[10] Paraphrasing helps you maintain a consistent tone while using vocabulary that's familiar to your audience. Of course, you still need to credit the originator of the information, but you don't need quotation marks or indented paragraphs. Follow these tips to paraphrase effectively and ethically:[11]

- Read and analyze the source material until you are thoroughly familiar with its main idea and key points. Reread it as many times as needed to make sure you understand it.
- For longer passages or technical material, jot down notes in your own words to remind yourself of the key points.
- Without looking at the original, express its main idea and key points in your own words. You are writing from your memory of the material or from your notes here, not from the material itself.
- As you write your version, imagine that you are explaining it to someone else.
- If it helps with expressing the key ideas in your own words, consider changing the structure of the material (making sure it still flows logically and smoothly).
- For words or phrases that are commonly used in a particular field, you don't need to replace them with your own language. For example, "closing the books" is a common phrase in accounting, so you don't need to replace it. However, if the source used an original phrasing such as "slam the door on a disastrous quarter," you would need to rephrase this in your own language or quote it directly.
- Revise your draft for clarity and conciseness, and to make sure it is written in your voice.
- Document the source using a footnote or other citation method.

Summarizing is similar to paraphrasing but distills the content into fewer words.

Summarizing is similar to paraphrasing but presents the gist of the material in fewer words than the original. An effective summary identifies the main ideas and major support points from your source material but leaves out minor details, examples, and other information that is less critical to your audience. Like quotations and paraphrases, summaries also require complete documentation of sources.

Of course, all three approaches require careful attention to ethics. When quoting directly, take care not to distort the original intent of the material by quoting selectively or out of context. If an interview subject said, "This market could grow dramatically next year if we invest heavily in new products," using only "this market could grow dramatically next year" in a report would be unethical.

When paraphrasing and summarizing, preserve the intended message of the original while expressing the ideas in your own words and sentences. Remember that the goal is to help your audience relate to material that supports your message. Double-check your writing to make sure you didn't subconsciously skew the other writer's message to fit your own needs. And never resort to plagiarism—such as copying material from an online source and dropping it into a report without giving proper credit.

ANALYZING NUMERIC DATA

Research often produces numeric data—everything from sales figures to population statistics to survey answers. By themselves, these numbers might not provide the insights you or your audience require, so you'll need to process the data to extract useful insights.

Gaining Insights

A *mean* is the average of a group of data values; the *median* is the midpoint with an equal number of values higher and lower, and *mode* is the most common value in the set.

Even without advanced statistical techniques, you can use simple arithmetic to extract powerful insights from sets of research data. Three common and useful measures are shown in Table 13.1. The **mean** (which is what most people refer to when they use the term *average*) is the sum of all the items in a group divided by the number of items in that group. The **median** is the midpoint of a series, with an equal number of items above and below. The **mode** is the number that occurs more often than any other in a sample. It's the best answer to a question such as "What is the typical amount?" Each of these three measures can give you different insights into a set of data.

TABLE 13.1 Three Types of Data Measures: Mean, Median, and Mode

Wilson	$3,000	
Green	5,000	
Carrick	6,000	
Cho	7,000	← Mean
Keeble	7,500	← Median
Lopes	8,500	
O'Toole	8,500	← Mode
Mannix	8,500	
Caruso	9,000	
Total	$63,000	

Be careful not to let any of these statistical parameters create a skewed impression of the data set. For example, the mean value of 9, 11, 12, and 156 is 47, which isn't close to any of the individual values and might not reflect the true nature of the data. The value of 156 in this case would be considered an *outlier* that needs more analysis to figure out what it means relative to the other values.

Trends identify patterns that tend to repeat over time.

Next, look at the data to spot **trends**—definite patterns taking place over time, including growth, decline, and cyclical trends that vary between growth and decline. By examining data over time, you can detect patterns and relationships that help you answer important questions.

Causation shows cause-and-effect relationships; *correlation* indicates simultaneous changes in two variables that may not necessarily be causally related.

Statistical measures and trends identify *what* is happening. To help you understand *why* those things are happening, look at **causation** (the cause-and-effect linkage between two factors, in which one causes the other to happen) and **correlation** (the simultaneous change in two variables you're measuring, such as customer satisfaction dropping when product reliability drops).

Bear in mind that causation can be easy to assume but difficult to prove. The drop in customer satisfaction might have been caused by something else happening at the same time, such as a new accounting system that fouled up customer invoices. To prove causation, you need to be able to isolate the suspected cause as the *only* potential source of the change in the measured effect. Eliminating all but one possible cause isn't always feasible, so you often must apply careful judgment to correlations. Researchers frequently explore the relationships between subsets of data using a technique called *cross-tabulation*. For instance, if you're trying to figure out why total sales rose or fell, you might look separately at sales data by customer age, purchase location, and product type.

Guarding Against Mistakes and Misinterpretations

Watch out for errors that might have crept in during the collection and processing of data.

Numbers are easy to manipulate with spreadsheets and other computer tools, so be sure to guard against computational errors and misinterpretation of results. Double-check all calculations and document the operation of any spreadsheets you plan to share with colleagues. Common spreadsheet mistakes to watch for include errors in math formulas, references to unintended cells in the spreadsheet (resulting in the inclusion of data you don't want or the exclusion of data you do want), and failures to understand or verify the operation of the spreadsheet's built-in math functions.

In addition to watching for computational errors, step back and look at your entire set of data before proceeding with any analysis. Do the numbers make sense, based on what you know about the subject? Are any data points suspicious? If the production numbers you've been measuring have never varied more than 10 percent month to month and then suddenly jumped 50 percent last month, is that new number real or an erroneous measurement?

Even when your data points are accurate and your analysis is technically correct, it's still possible to misinterpret or misrepresent the results. Many analysis errors require statistical expertise to identify and fix, but even without advanced skills, you can take these precautions:

- **Avoid faulty comparisons.** Make sure you compare "apples to apples" and not "apples to oranges," as the saying goes.
- **Don't push research results beyond their limits.** The temptation to extract insights and assurances that aren't really there can be strong, particularly in situations of great uncertainty. For instance, if you're about to recommend that your company invest millions of dollars in developing a new product based on your consumer research, you're likely to "see" every possible justification in the data. Have a trusted colleague review your data to see whether he or she extracts the same conclusions.
- **Steer clear of misleading presentations.** Even valid data can be presented in invalid ways (such as with distorted graphs), and it's your responsibility to make sure the visual presentation of your data is accurate.

Applying Your Findings

5 LEARNING OBJECTIVE
Explain how to summarize research results and present conclusions and recommendations.

After all your planning, research, and processing, you're finally ready to apply your findings. This step can involve summarizing your results, drawing conclusions based on those results, and making recommendations.

SUMMARIZING YOUR RESEARCH

A research summary is an unbiased presentation of information regarding a topic without attempts to draw conclusions or make recommendations.

A research summary is an unbiased condensation of the information uncovered in your research. (*Summary* in this context means a summary of your entire research project, not just a summary of secondary source material.) Summaries should not include opinions, conclusions, or recommendations. Summarizing is not always a simple task, and your readers will judge your ability to separate significant issues from less significant details. Identify the main idea and the key support points; separate them from details, examples, and other supporting evidence (see Figure 13.5). Focus your efforts on your audience, highlighting the information that is most important to the person who assigned the project or to those who will be reading the report.

Focusing on the audience doesn't mean conveying only the information your audience wants to hear. A good summary might contain nothing but bad news, if that's what your research uncovered. Even if the summary isn't pleasant, effective managers always appreciate and respect honest, complete, and perceptive information from their employees.

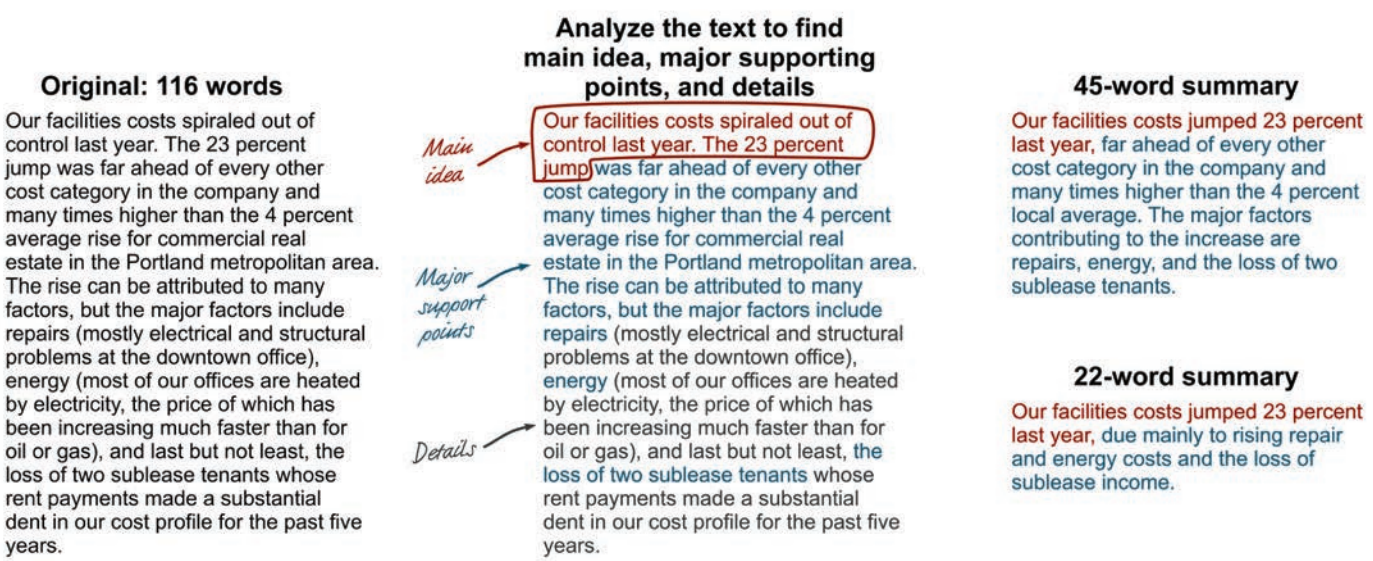


Figure 13.5 Summarizing Effectively
To summarize a section of text, first analyze it to find the main idea, the major support points, and the less important details. Then assemble the appropriate pieces with additional words and phrases as needed to ensure a smooth flow.

DRAWING CONCLUSIONS

A *conclusion* is a logical interpretation of research results.

A **conclusion** is a logical interpretation of the facts and other information in a report. Reaching valid conclusions based on the evidence at hand is one of the most important skills you can develop in your business career. For a conclusion to be sound, it must meet two criteria. First, it must be based strictly on the information in your report. You shouldn't introduce any new information in your conclusion. (If something is that important, it belongs in the body of the report.) Also, you can't ignore any of the significant information you've presented if it doesn't support your conclusion. Second, the conclusion must be logical, meaning it must follow accepted patterns of inductive or deductive reasoning. Conclusions that are based on unproven premises, appeal to emotion, make hasty generalizations, or contain any other logical fallacies are not valid.

Remember that your personal values or the organization's values may also influence your conclusions; just be sure that you're aware of how these biases can affect your judgment. If a bias affects your conclusion, you should explain it to your audience.

Even though conclusions need to be logical, they may not automatically or obviously flow from the evidence. Many business decisions require assumptions, judgment calls, and creative thinking—in fact, the ability to see patterns and possibilities that others can't see is one of the hallmarks of innovative business leaders.

MAKING RECOMMENDATIONS

A *recommendation* is a suggested course of action.

Whereas a conclusion interprets information, a **recommendation** suggests what to do about the information. The following example illustrates the difference between a conclusion and a recommendation:

Conclusion	Recommendation
On the basis of its track record and current price, I believe that this company is an attractive buy.	I recommend that we offer to buy the company at a 10 percent premium over the current market value of its stock.

To be credible, recommendations must be based on logical analysis and sound conclusions. When making a recommendation, be certain you have adequately described the steps that come next. Don't leave your readers wondering what they need to do to act on your recommendation.

MAKING YOUR RESEARCH AVAILABLE TO OTHERS

Look for ways to distribute and archive your research results so that others in your organization can make use of them.

Conducting research does more than provide strong support for your own writing projects. Your individual research projects are also an important contribution to your organization's collective knowledge base, so look for ways to distribute and archive your research results so that other people can access it later. Your company may have a formal knowledge management system where you are expected to archive research results, marketing plans, and other formal documents. Alternatively, an internal blog, social network, or messaging system might be a good mechanism for sharing and storing the information.

COMMUNICATION CHALLENGES AT Strategyzer

You're a business development manager at Strategyzer with responsibility for expanding sales of the company's Business Model Canvas training courses and apps. Use what you've learned in this chapter to address these information gathering and processing challenges.

INDIVIDUAL CHALLENGE: You've heard from a number of product managers and other midlevel business planners in big companies that they would like to use the Business Model Canvas but they can't convince company executives (their superiors, in other words) to give up the familiar approach of detailed

business plans. You hit on the idea of a mini-course for corporate executives to help them understand the value of the canvas approach for early stage business planning. Before you can convince Strategyzer's content development team to create the course, you need to provide some evidence that *Fortune* 500 executives would be interested in devoting half a day to such a course. You decide to conduct some research to gauge executive interest in the mini-course and to identify the most important topics it should cover. What would be an effective problem statement for guiding your research?

TEAM CHALLENGE: Collect the problem statements you and your teammates generated for the individual challenge and choose the statement that the team finds most effective. Using that statement as a guide, discuss the following four approaches and decide which would be the best research approach to gathering the information you need to address the problem statement. Summarize your reasoning in an email message to your instructor.

a. Conduct a telephone survey of *Fortune* 500 executives responsible for overseeing product development. Ask a series of questions designed to uncover the executives' awareness of the canvas approach and their attitudes toward it.
b. Conduct an email or in-app survey of current users of the Business Model Canvas app asking them to report on the resistance they are receiving from executives in their companies.
c. Post a brief survey on Strategyzer's website asking top-level corporate executives to explain their reasons for sticking with the traditional approach of detailed business plans rather than trying a new method such as the Business Model Canvas.
d. Post an interactive survey on Strategyzer's website asking site visitors to report on the attitudes toward Business Model Canvas and similar approaches in their organizations. Set up branching in the survey so that people who are interested in the canvas method but who have encountered resistance from upper management are asked a series of questions about the nature of the resistance they are encountering and what forms of proof could help convince these executives to give the new method a try.

Key Terms

causation Cause-and-effect linkage between two factors, where one of them causes the other to occur or change
closed-ended questions Questions with a fixed range of possible answers
conclusion A logical interpretation of the facts and other information in a report
correlation The simultaneous change in two variables; changes in one variable may or may not cause changes in the other
focus group A form of group research interview in which a moderator guides a group through a series of discussion questions while the rest of the research team members observe
mean Value equal to the sum of all the items in the group divided by the number of items in that group; what people refer to when they use the term *average*
median Midpoint of a series, with an equal number of items above and below
metasearch engines Search tools that format search requests for multiple search engines simultaneously
mode The number that occurs more often than any other in a sample
open-ended questions Questions without predetermined answers; used to solicit opinions, insights, and information
primary research New research done specifically for the current project
problem statement Statement that defines the problem or purpose of your research
recommendation A suggested course of action
search engines Online search tools that identify individual webpages that contain specific words or phrases you've asked for
secondary research Research done previously for another purpose
trends Repeatable patterns taking place over time

Summary of Learning Objectives

1 Describe an effective process for conducting business research. Begin the research process with careful planning to make sure you familiarize yourself with the subject area, identify the most important information gaps you face, and prioritize the questions you need to ask to fill those gaps. Then locate the required data and information, using primary and secondary research as needed. Process the results of your research, analyzing both textual and numeric information to extract averages, trends, and other insights. Apply your findings by summarizing information for someone else's benefit, drawing conclusions based on what you've learned or developing recommendations. Finally, manage information effectively so that you and others can retrieve it later and reuse it in other projects.

2 Define *secondary research*, and explain how to evaluate, locate, and document information sources. Secondary research involves collecting information that was originally gathered for another research project or another effort. Secondary research is generally done before primary research to save time and money in the event someone else has already gathered the information needed.

Information should come from a credible source that has a reputation for being honest and reliable; the source should also be unbiased. The purpose of the material should be known, and the author should be credible. The information should include references to sources (if obtained elsewhere), and it should be independently verifiable. The material should be current, complete, and supported with evidence. Finally, the information should seem logical.

The tasks involved in locating secondary sources of data and information can vary widely depending on the project, but much of your efforts will involve finding information in a corporate, public, or university library or finding

information online. Libraries offer an array of business books, databases, newspapers, periodicals, directories, almanacs, and government publications. Online research tools can be roughly divided into search tools (which you use interactively to find information) and monitoring tools (which you set up to watch for new information that may appear as time passes).

To make the best use of any search engine or database, think about your information needs carefully before you start searching, read and understand the instructions for using each online research tool, pay attention to the details because even minor aspects of searching can dramatically influence results, review search and display options carefully to optimize results, try variations on your search terms if you can't find what you're looking for, and try narrower or broader searches to adjust the scope of what you're looking for.

3 Define *primary research*, and outline the steps involved in conducting surveys and interviews. Primary research is research that is being conducted for the first time, and the two most common methods are surveys and interviews. Conducting a survey involves selecting a representative set of respondents from the population you are studying, developing a questionnaire using carefully written and sequenced questions, and administering the actual survey to collect information. Conducting an interview starts with learning about the person(s) you plan to interview and then formulating your main idea to make sure your interview will stay focused. Choose the length, style, and organization of the interview, and then select question types to elicit the sort of information you want, with each question designed to collect useful answers. Limit your questions to the most important queries. Record the interview if the person allows, and review your notes as soon as the interview ends.

4 Describe the major tasks involved in processing research results. In most cases you need to process your research results in some fashion before applying them in reports and presentations. The three basic ways to process verbal information are quoting (using someone else's words directly, with appropriate attribution), paraphrasing (restating someone else's words in your own language), and summarizing (creating a shorter version of an original piece of writing). Processing numeric data can involve a variety of statistical analysis techniques. Three basic computations are the mean (what people are referring to when they say "average"), the median (the midpoint in a series, indicating an equal number of lesser and greater values), and the mode (the most frequently occurring value in a series). Processing results can also involve looking for trends and distinguishing causal relationships from correlations and mere coincidences.

5 Explain how to summarize research results and present conclusions and recommendations. Research results can be applied in several ways, depending on the purpose of the report or presentation. A summary is an unbiased condensation of the information uncovered in your research. It filters out details and presents only the most important ideas. A conclusion is your analysis of what the findings mean (an interpretation of the facts). A recommendation is your opinion (based on reason and logic) about the course of action that should be taken.

Test Your Knowledge

To review chapter content related to each question, refer to the indicated Learning Objective.

13-1. How can online monitoring tools help you with research? [LO-2]
13-2. What are the five steps in the research process? [LO-1]
13-3. What is the purpose of identifying information gaps before starting research? [LO-1]
13-4. Should you conduct secondary research first or primary research? Why? [LO-2]
13-5. What is the *hidden internet*? [LO-2]
13-6. Why should you emphasize open-ended questions in research interviews? [LO-3]
13-7. What is paraphrasing, and what is its purpose? [LO-4]
13-8. What are the differences between the mean, median, and mode? [LO-4]
13-9. What are the characteristics of a sound conclusion? [LO-5]
13-10. How does a conclusion differ from a recommendation? [LO-5]

Apply Your Knowledge

To review chapter content related to each question, refer to the indicated Learning Objective.

13-11. Companies occasionally make mistakes that expose confidential information, such as when employees lose laptop computers containing sensitive data files or webmasters forget to protect confidential webpages from search engine indexes. If you conducted a search that turned up competitive information on webpages that were clearly intended to be private, what would you do? Explain your answer. [LO-1]
13-12. Why must you be careful when citing information from online sources? [LO-2]
13-13. What search terms could you use to find estimates of the lifetime financial value of a college education? [LO-2]
13-14. One of your employees submitted a report comparing the market opportunities for two product ideas your company might develop. The report concludes that because the first idea yielded 340,000 hits in a Google search, whereas the second idea yielded only 128,000 hits, the first idea clearly has more sales potential. Is this a valid conclusion? Why or why not? [LO-4]
13-15. While analyzing last year's sales data, you notice that sales were 10 to 15 percent higher than average during August, September, and November. The marketing department invested heavily in a search engine advertising campaign from August through December. Can you conclude that the advertising campaign caused the increase in sales? Why or why not? [LO-5]

Practice Your Skills

Message for Analysis

13-16. Primary Research: Conducting Interviews [LO-4] Imagine you are going to interview a midlevel manager in a large corporation about the company's meeting

practices. Read the questions and then (1) critique them, as a whole, indicating what is effective or ineffective about this series of questions and (2) select five questions and revise them to make them more effective.

a. What is your position in the company?
b. To whom do you report?
c. Do you attend or run many meetings?
d. Do your meetings start on time? Run late?
e. Do you distribute or receive a meeting agenda several days in advance of the meeting?
f. Do you like your job?
g. Do you travel a lot for your job?
h. Has your company cut back on travel expenditures? If so, how and why?
i. Does your company use videoconferencing or online meetings as an alternative to travel?
j. Does your company own its own videoconferencing equipment?
k. Are virtual meetings more or less effective than face-to-face meetings?
l. How long have you worked at this company?
m. Who are your most important customers?
n. How often does your management team meet with the managers of other companies?
o. Does your company produce a wide range of products or only a few specialty items?
p. How do you keep your meetings on track?
q. Does someone prepare written minutes of meetings? Are the minutes distributed to meeting members?

Exercises

Each activity is labeled according to the primary skill or skills you will need to use. To review relevant chapter content, you can refer to the indicated Learning Objective. In some instances, supporting information will be found in another chapter, as indicated.

Planning Your Research; Collaboration: Team Projects [LO-1] In a team assigned by your instructor, decide how you would structure a research project to answer the following questions. Identify any shortcomings in the approaches you have chosen.

13-17. Has the litter problem on campus been reduced since the cafeteria began offering fewer take-out choices this year than in past years?

13-18. Has the school attracted more transfer students since it waived the formal application process and allowed students at other colleges simply to send their transcripts and a one-page letter of application?

13-19. Have the number of traffic accidents at the school's main entrance been reduced since a traffic light was installed?

13-20. Did student satisfaction with campus libraries decline after budget cuts forced the libraries to reduce their hours of operation?

13-21. Planning a Research Project [LO-1] You and your business partners are considering buying several franchises in the fast-food business. You are all experienced managers or entrepreneurs, but none of you has experience in franchising. Visit **www.amazon.com** and search for books on this subject. Explore some of the books that you find by reading reviews and using the "look inside" feature.

a. Use the information you find to develop a list of subquestions to help you narrow your focus.
b. Write down the names of three books you might purchase to further aid your research.
c. Summarize how a search like this can assist you with your research efforts and identify any risks of using this technique.

13-22. Planning a Research Project [LO-1] Analyze any recent school or work assignment that required you to conduct research. How did you approach your investigation? Did you rely mostly on sources of primary information or mostly on sources of secondary information? Now that you have studied this chapter, can you identify two ways to improve the research techniques you used during that assignment? Briefly explain.

Conducting Secondary Research (Company and Industry Data) [LO-2] Using online or printed sources, find the following information. Be sure to properly cite your sources, using the formats discussed in Appendix B.

13-23. Contact information for the American Management Association

13-24. Median weekly earnings of men and women by occupation

13-25. Current market share for Perrier water

13-26. Performance ratios for office supply retailers

13-27. Annual stock performance for Nike

13-28. Number of franchise outlets in the United States

13-29. Composition of the U.S. workforce by profession

Conducting Secondary Research (Finding Sources) [LO-2] Businesspeople must know where to look for secondary information when they conduct research. Identify five periodicals or online resources in each the following professions:

13-30. Marketing and advertising

13-31. Insurance

13-32. Telecommunications

13-33. Accounting

13-34. Conducting Secondary Research (Documenting Sources) [LO-2] Select five business articles from sources such as journals, books, newspapers, or websites. Develop a resource list, using Appendix B as a guideline.

13-35. Conducting Secondary Research (Evaluating Sources) [LO-2] Find three websites that provide business information such as company or industry news, trends, analysis, facts, or performance data. Using the criteria discussed under "Evaluating Sources" on page 376, evaluate the credibility of the information presented at these websites.

13-36. Conducting Secondary Research (Online Monitoring); Media Skills: Microblogging [LO-2], Chapter 8 Select a business topic that interests you and configure a Twitter monitoring tool such as TweetDeck (**tweetdeck.twitter.com**) to track tweets on this topic. After you've found at least a dozen tweets, identify three that provide potentially useful information and describe them in a brief email message to your instructor.

13-37. Conducting Secondary Research (Company Data) [LO-2] Select any publicly traded company and find the following information:

- Names of the company's current officers
- List of the company's products or services (summarized by product lines or divisions if the company offers many products and services)
- Current issues in the company's industry
- Outlook for the company's industry as a whole

13-38. Conducting Secondary Research (Industry Issues) [LO-2] You'd like to know if it's a good idea to buy Google ads to drive more traffic to your company's website. (You can learn more about Google advertising programs at **ads.google.com/home**.) Identify three secondary sources outside of Google that might offer helpful insights on this question.

13-39. Conducting Primary Research (Surveys) [LO-3] You work for a movie studio that is producing a young director's first motion picture, the story of a group of unknown musicians finding work and making a reputation in a competitive industry. Unfortunately, some of your friends leave the first complete screening, saying that the 182-minute movie is simply too long. Others said they couldn't imagine any sequences to cut out. Your boss wants to test the movie on a regular audience and ask viewers to complete a questionnaire that will help the director decide whether edits are needed and, if so, where. Design a questionnaire you can use to solicit valid answers for a report to the director about how to handle the audience members' reactions to the movie.

13-40. Conducting Primary Research (Interviews) [LO-3] Plan an information interview with a professional working in your chosen field of study. Plan the structure of the interview and create a set of interview questions. Conduct the interview. Using the information you gathered, write a memo to another student, describing the tasks, advantages, and disadvantages of jobs in this field of study. (Assume that your reader is a person who also plans to pursue a career in this field of study.)

13-41. Conducting Primary Research (Interviews) [LO-3] You're conducting an information interview with a manager in another division of your company. Partway through the interview, the manager shows clear signs of impatience. How should you respond? What might you do differently to prevent this from happening in the future? Explain your answers.

13-42. Processing Data and Information [LO-4] Select an article from a business periodical such as *Bloomberg Businessweek, Fortune*, or *Forbes*. Read the article and highlight its key points. Summarize the article in fewer than 100 words, paraphrasing the key points.

13-43. Processing Data and Information [LO-4] Your boss has asked you to analyze and report on your division's sales for the first nine months of this year. Using the following data from company invoices, calculate the mean for each quarter and all averages for the year to date. Then identify and discuss the quarterly sales trends.

January	$24,600
February	$25,900
March	$23,000
April	$21,200
May	$24,600
June	$26,800
July	$29,900
August	$30,500
September	$26,600

Expand Your Skills

Critique the Professionals

Find a recent example of a significant business blunder, such as a new product that failed in the marketplace. Based on what you can learn about the episode, how might better research have helped the company in question avoid the blunder? Using whatever medium your instructor requests, write a brief conclusion of your analysis.

Sharpening Your Career Skills Online

Find a website, video, article, podcast, or presentation that offers advice on using online search tools in business research. Write a brief email message to your instructor, describing the item you found and summarizing the career skills information you learned from it.

Build Your Career

As you begin to map out your post-college plans, you may have concerns about some aspect of your personal history, career history, or overall fit for the types of jobs you hope to land. Depending on where you are in your career and life, you might be worried about inexperience, frequent job changes, slow career growth, gaps in your work history, overqualification, your age, a criminal record, or job termination for cause.

If one of these situations is relevant to your career aspirations, it's good to recognize it early because there are specific steps you can take during the job-search process to minimize any limitations that an issue might pose. Doing so will help you present your qualifications to potential employers in the best possible light, and it will help reduce the anxiety you might be feeling as you approach the application and interview stage. You could also be pleasantly surprised to discover that a point of worry doesn't need to be a major stumbling block after all. "Addressing Areas of Concern" on page 527 offers quick tips for each of these situations. Talking with an adviser in your college's career center can also help you map out a plan that fits your unique situation.

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14 Planning Reports and Proposals

LEARNING OBJECTIVES

After studying this chapter, you will be able to

1. Adapt the three-step writing process to reports and proposals.
2. List the options for organizing informational reports, and identify the key parts of a business plan.
3. Discuss three major ways to organize analytical reports.
4. Explain how to choose an organizational strategy when writing a proposal.



Rick Dalton - Ag/Alamy Stock Photo

John Deere is one of the oldest and most iconic corporations in the United States, but it is also an innovator in many technological areas. The company uses its annual reports to help convey that sense of forward energy and innovation.

COMMUNICATION CLOSE-UP AT John Deere

www.deere.com

Corporate annual reports are a specialized type of report that most business communicators won't ever be involved with, but they can be great examples to study for writing techniques. These reports serve two key purposes: (1) meeting regulatory financial reporting requirements established by the U.S. Securities and Exchange Commission (SEC) and (2) updating shareholders on the company's recent progress and plans for the future. An annual report may also address a company's other stakeholders by discussing its involvement in the community, its progress on environmental issues, and other topics of widespread interest. The readership of these reports includes government regulators, current and potential investors, lenders, business partners, journalists, activists, and potential employees.

With so many subjects to cover and so many distinct audiences, the annual report for a large corporation is a complex document. It may have a half-dozen or more sections and can exceed 100 pages in length. (The industrial conglomerate General Electric has published annual reports of 250-plus pages.) Many companies now supplement a conventional report with videos and interactive multimedia as well.

As a model for studying report-writing techniques, you can divide any annual report into two distinct parts. The "back end" contains the required regulatory reporting, a detailed discussion of financial results, and a variety of other financial data. This part is typically the bulk of the report, constituting anywhere from 70 to 90 percent of the page count, and its audiences are regulators, financial professionals, and diligent individual investors.

The "front end" is the interesting part for report-writing study. Whereas the back end is serious business—dense text in a formal tone and dozens of numerical tables—the front end is somewhere between an informational report and a promotional brochure. All annual reports include a *Letter to Shareholders* (which can be titled *Chairman's Message* or something similar), and many include additional "mini-reports," such as customer success stories or descriptions of new products.

If a company struggled during the previous year or faces significant challenges in the upcoming year, the front end tries to assure investors that management has responded and has a plan in place to improve financial results. And if a company has been doing well, the front end aims to assure investors that the

company is positioned to continue that success. In either case, the ultimate goal is to drive up the company's stock price by convincing investors that it is an attractive investment.

Recent annual reports from the equipment manufacturer John Deere offer some great examples of how corporations use the front end of the annual report to communicate with investors and other audiences. Deere is one of the oldest and most iconic corporations in the United States, dating back to Illinois blacksmith John Deere's 1837 invention of a plow optimized for heavy soils of Midwest prairies—a product with such lasting impact that *Smithsonian* magazine named this plow one of its "101 Objects That Made America." Nearly two centuries later, the company is now a global giant, with a product portfolio ranging from home riding mowers to construction, forestry, and agricultural equipment.

A rich history can be a valuable branding asset for a company, but it can also be perceived as a negative if it makes the company seem past its prime or out of step with contemporary business. For all its vast legacy, John Deere is also on the leading edge of technology, with innovations in satellite mapping, computer vision, artificial intelligence, and other ways to improve performance and reduce environmental impact.

To convey this sense of innovation, Deere's 2018 annual report features headings and subheadings such as these:

> John Deere Has a Fresh, Youthful Outlook
>
> We're Eager to Innovate and Lead
>
> At the Heart of Our Strategy: An Intense Commitment to Innovation and Quality

In addition to these forward-looking messages, two other aspects stand out about these headings. First, they are informative rather than merely descriptive—they say something *about* each topic rather than simply identifying it. Second, on the surface they don't seem to express the "you" attitude because they are all about the company, but in a subtle way they are audience-oriented. Most people who read an annual report want to know what the company is doing to improve its stock price, and these headlines work to convey that message.

Corporations put some of their most skilled communicators to work on annual reports, so take advantage of these free publications to learn how top business writers tackle some of the more interesting challenges in business communication.[1]

Applying the Three-Step Writing Process to Reports and Proposals

1 LEARNING OBJECTIVE
Adapt the three-step writing process to reports and proposals.

Analytical reports offer both information and analysis and can also include recommendations.

Informational reports offer data, facts, feedback, and other types of information without analysis or recommendations.

Proposals are a special category of reports that combine information delivery and persuasive communication.

Given the length and complexity of many reports, it's important to clearly define your purpose so you don't waste time with avoidable rework.

The annual reports produced by John Deere (profiled in the chapter-opening Communication Close-Up) are just one example of the wide array of reports that business professionals are called on to produce (see Figure 14.1). **Informational reports** offer data, facts, feedback, and other types of information without analysis or recommendations. **Analytical reports** offer both information and analysis and can also include recommendations. **Proposals** are a special category of reports that combine information delivery and persuasive communication.

No matter the circumstances, reports require all the communication skills you've gained throughout this course and will continue to gain on the job. View every business report as an opportunity to demonstrate your understanding of business challenges and your ability to contribute to your organization's success.

ANALYZING THE SITUATION

Business reports can be complex, time-consuming projects, so analyze the situation carefully before you start. With an email or another short message, you can change direction halfway through the first draft and perhaps lose only a few minutes of work. In contrast, if you change direction halfway through a major report, you could lose days of work. To minimize that chance, pay special attention to your statement of purpose. In addition, for anything beyond the simplest reports, take the time to prepare a work plan before you start writing.

Defining Your Purpose

Informational reports often address a predetermined need and must meet specific audience expectations. For example, you may be asked to write reports that verify your company's compliance with government regulations, that summarize sales, or that monitor a process—all of which have audiences who expect certain information in a

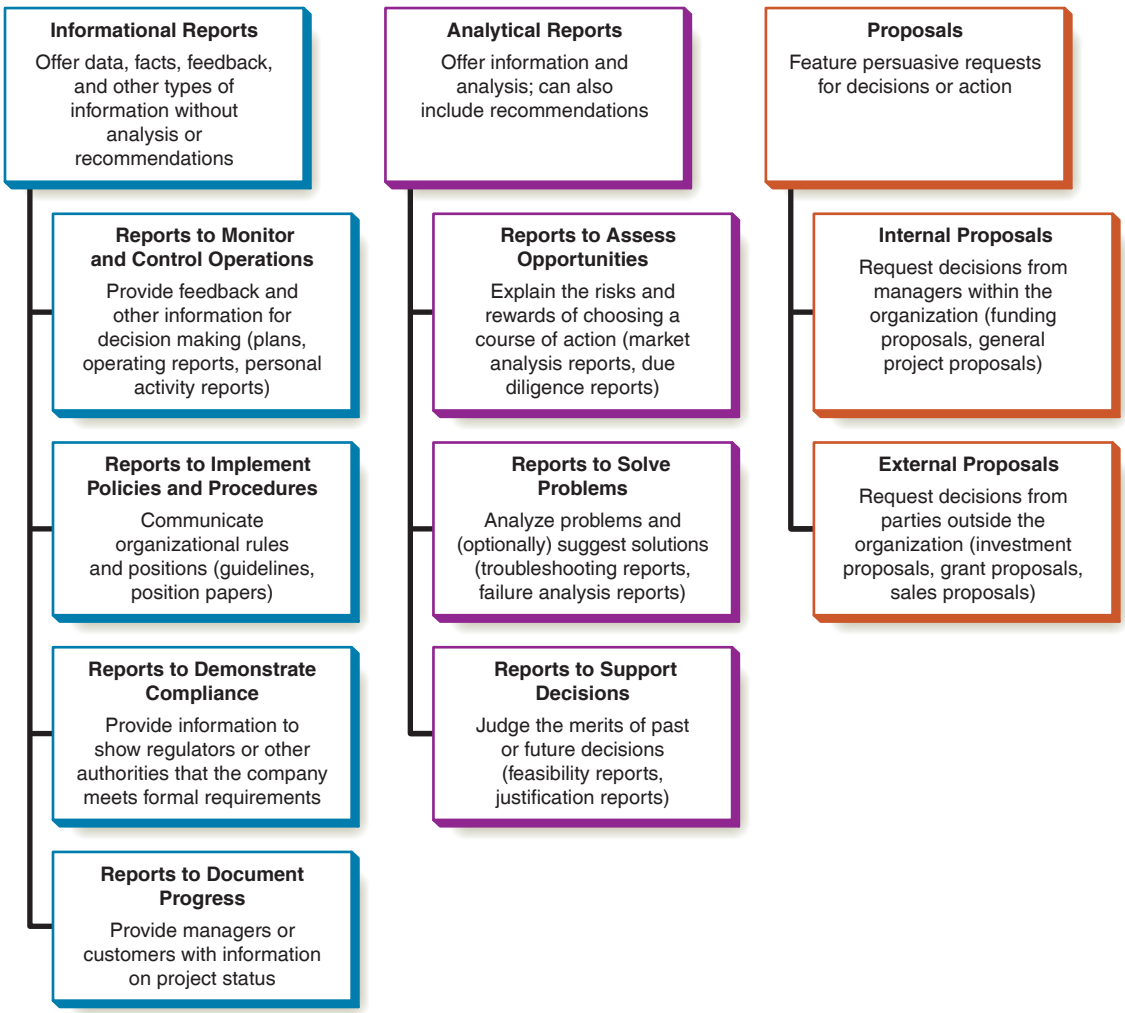


Figure 14.1 Common Types of Business Reports and Proposals
You will have the opportunity to read and write many types of reports in your career; here are some of the most common.

certain format. With other informational reports, you will need to uncover audience needs before you can define the optimum purpose.

In some cases you'll be told the purpose of the report; in others, it's up to you to identify the purpose.

Analytical reports and proposals are almost always written in response to a perceived problem or a perceived opportunity. A clear statement of this problem or opportunity helps frame the communication challenge by identifying *what* you're going to write about, but it's not enough to guide your writing efforts. To plan effectively, address the problem or opportunity with a clear **statement of purpose** that defines *why* you are preparing the report (see Table 14.1 on the next page).

A *statement of purpose* defines why a report is going to be prepared.

The most useful way to phrase your purpose statement is to begin with an infinitive (*to* plus a verb). Using an infinitive encourages you to take control and decide where you're going before you begin. When you choose an infinitive (such as *to inform*, *to confirm*, *to analyze*, *to persuade*, or *to recommend*), you pin down your overall goal in preparing the report. Consider these examples for informational reports:

- To update clients on the progress of the research project (progress report)
- To develop goals and objectives for the coming year (strategic plan)
- To identify customers and explain how the company will serve them (marketing plan)
- To submit monthly sales statistics to management (operating report)
- To summarize what occurred at the annual sales conference (personal activity report)
- To explain building access procedures (policy implementation report)
- To submit required information to the Securities and Exchange Commission (compliance report)

TABLE 14.1 Problem Statements Versus Purpose Statements

Problem Statement	Statement of Purpose
Our company's market share is steadily declining.	To explore new ways of promoting and selling our products and to recommend the approaches most likely to stabilize our market share
Our computer network lacks sufficient bandwidth and cannot be upgraded to meet our future needs.	To analyze various networking options and to recommend the system that will best meet our current and future needs
We need $2 million to launch our new product.	To convince investors that our new business would be a sound investment so that we can obtain desired financing
Our current operations are too decentralized and expensive.	To justify closing the Newark plant and transferring East Coast operations to a single Midwest location to save money

The statement of purpose for an analytical report often needs to be more comprehensive than a statement for an informational report. For example, a report suggesting ways to reduce employee travel and entertainment (T&E) costs might have the following as a statement of purpose:

> . . . to analyze the T&E budget, evaluate the impact of recent changes in airfares and hotel costs, and suggest ways to tighten management's control over T&E expenses.

If the writer had been assigned an informational report instead, she might have stated her purpose differently:

> To summarize the company's spending on travel and entertainment

You can see from these two examples how much influence the purpose statement has on the scope of your report. Because she was assigned an analytical report rather than an informational report, the writer had to go beyond merely collecting data; she had to draw conclusions and make recommendations. (You can see the full report based on this statement of purpose in Chapter 15.)

Proposals must also be guided by a clear and specific statement of purpose to help you focus on crafting a persuasive message. Here are several examples:

> To secure $400k of funding in next year's capital budget for a new conveyor system in the warehouse (funding proposal)
>
> To get management approval to reorganize the North American salesforce (general project proposal)
>
> To secure $2 million in venture capital funding to complete design and production of the new line of titanium mountain bikes (investment proposal as part of a business plan)
>
> To convince Boeing to purchase a trial subscription to our latest database offering (sales proposal)

Preparing Your Work Plan

A detailed work plan saves time and helps produce more effective reports.

You're already accustomed to some schedule pressure with school reports. This is good practice for your business career, in which you'll be expected to produce quality reports quickly and efficiently. Carefully thinking out a work plan is the best way to make sure you produce good work on schedule (see Figure 14.2).

For simpler projects, the work plan can be relatively informal: a simple list of the steps you plan to take and an estimate of their sequence and timing. For more complicated projects, however, particularly those that involve multiple team members, you'll want to prepare a formal, detailed work plan that can guide the performance of all the required tasks. A formal work plan might include the following elements (especially the first two):

- **Statement of the problem or opportunity.** This statement clarifies the challenge or opportunity at hand and helps you (and anyone working with you) stay focused on the core issues.

The problem statement clearly and succinctly defines the problem the writers intend to address.

This section explains how the researchers will find the data and information they need.

The assignments and schedule section clearly lists responsibilities and due dates.

STATEMENT OF THE PROBLEM

The rapid growth of our company over the past five years has reduced the sense of community among our staff. People no longer feel like part of an intimate organization that values teamwork.

PURPOSE AND SCOPE OF WORK

The purpose of this study is to determine whether social networking technology such as Facebook and Socialtext would help rebuild a sense of community within the workforce and whether encouraging the use of such tools in the workplace will have any negative consequences. The study will attempt to assess the impact of social networks in other companies in terms of community building, morale, project communication, and overall productivity.

This paragraph identifies exactly what will be covered by the research and addressed in the final report.

SOURCES AND METHODS OF DATA COLLECTION

Data collection will start with secondary research, including a review of recently published articles and studies on the use of social networking in business and a review of product information published by technology vendors. Primary research will focus on an employee and management survey to uncover attitudes about social networking tools. We will also collect anecdotal evidence from bloggers and others with experience using networks in the workplace.

PRELIMINARY OUTLINE

The preliminary outline for this study is as follows:

I. What experiences have other companies had with social networks in the workplace?
   A. Do social networks have a demonstrable business benefit?
   B. How do employees benefit from using these tools?
   C. Has network security and information confidentiality been an issue?
II. Is social networking an appropriate solution for our community-building needs?
   A. Is social networking better than other tools and methods for community building?
   B. Are employees already using social networking tools on the job?
   C. Will a company-endorsed system distract employees from essential duties?
   D. Will a company system add to managerial workloads in any way?
III. If we move ahead, should we use a "business-class" network such as Socialtext or a consumer tool such as Facebook?
   A. How do the initial and ongoing costs compare?
   B. Do the additional capabilities of a business-class network justify the higher costs?
IV. How should we implement a social network?
   A. Should we let it grow "organically," with employees choosing their own tools and groups?
   B. Should we make a variety of tools available and let employees improvise on their own?
   C. Should we designate one system as the official company social network and make it a permanent, supported element of the information technology infrastructure?
V. How can we evaluate the success of a new social network?
   A. What are the criteria of success or failure?
   B. What is the best way to measure these criteria?

The preliminary outline has enough detail to guide the research and set reader expectations.

TASK ASSIGNMENTS AND SCHEDULE

Each phase of this study will be completed by the following dates:

Secondary research: Hank Waters	September 15, 2021
Employee and management survey: Julienne Cho	September 22, 2021
Analysis and synthesis of research: Hank Waters/Julienne Cho	October 6, 2021
Comparison of business and consumer solutions: Julienne Cho	October 13, 2021
Comparison of implementation strategies: Hank Waters	October 13, 2021
Final report: Hank Waters	October 20, 2021

Figure 14.2 Work Plan for a Report

A formal work plan such as this is a vital tool for planning and managing complex writing projects. The preliminary outline here helps guide the research; the report writers may well modify the outline when they begin writing the report.

- **Statement of the purpose and scope of your investigation.** The purpose statement describes what you plan to accomplish and therefore also defines the boundaries of your work. Identifying which subjects you will cover and which you won't is especially important for complex investigations.
- **Discussion of tasks to be accomplished.** In addition to planning, writing, and completing the report itself, you may need to conduct research or perform other tasks.
- **Description of any additional products or activities that will result from your investigation.** Often the only outcome of your efforts will be the report itself. In other cases you will be expected to produce something or perform some task in addition to completing the report. Make such expectations clear at the outset.
- **Review of project assignments, schedules, and resource requirements.** This should include task responsibilities, deadlines, and budgetary requirements. If more than one person will be involved, you may also want to include a brief section on coordinating report writing and production, such as whether you'll use a wiki to develop

the report content. If constraints on time, money, personnel, or data are likely to affect the quality of the report, identify these limitations up front.

- **Plans for following up after delivering the report.** Follow-up can be as simple as making sure people received the information they need or as complex as conducting additional research to evaluate the results of proposals included in your report.
- **Working outline.** Some work plans include a tentative outline of the report, as does the plan in Figure 14.2.

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GATHERING INFORMATION

Obtaining the information needed for many reports and proposals requires careful planning, and you may need to do a separate research project to acquire the data and information you need. To stay on schedule and on budget, be sure to review both your statement of purpose and your audience's needs so that you can prioritize your information needs and focus on the most important questions.

SELECTING THE RIGHT COMBINATION OF MEDIA AND CHANNELS

Consider audience requirements and feedback preferences when choosing the medium and channel for reports and proposals.

In addition to the general media and channel selection criteria discussed in Chapter 4, consider several points for reports and proposals. First, audiences may have specific media requirements, and you might not have a choice. For instance, executives in many corporations now expect to review many reports via their in-house intranets, sometimes in conjunction with a *dashboard*, a customized online presentation of highly summarized business information (see Figure 14.3).

Second, consider how your audience members want to provide feedback on your report or proposal. Do they prefer to write comments on a printed document or using commenting features in word-processing software, for instance? Third, will people need



klipfolio Inc.

Figure 14.3 Dashboards

To help information users avoid information overload, many companies now use dashboards to present carefully filtered highlights of key performance parameters. Dashboards are essentially super-summarized reports. The latest generation of software and mobile apps make it easy to customize screens to show each manager the specific summaries he or she needs to see.

to search through your document or update it in the future? Fourth, bear in mind that your choice of medium sends a message. For instance, a routine sales report dressed up in expensive multimedia could look like a waste of valuable company resources.

ORGANIZING YOUR INFORMATION

Use the direct approach for informational reports whenever your audience is likely to be receptive; use the indirect approach when you need to build support for your main idea.

The direct approach to reports is efficient and easy to follow, so use it whenever your audience is likely to be receptive or at least open-minded to what you have to say (see Figure 14.4). Lead with a summary of key findings, conclusions, recommendations, or

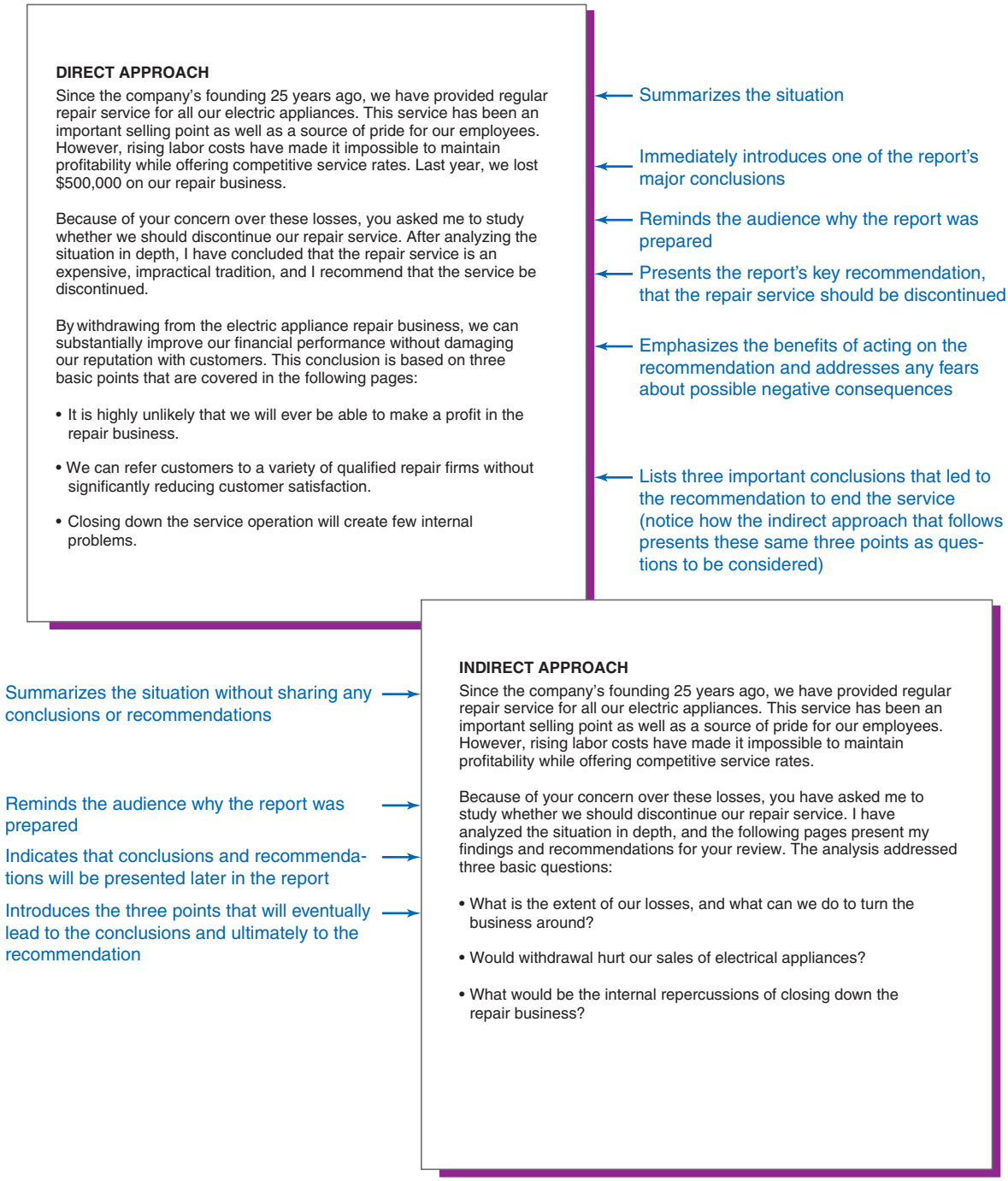


Figure 14.4 Direct Approach Versus Indirect Approach in an Introduction
In the direct version of this introduction, the writer quickly presents the report's recommendation, followed by the conclusions that led to that recommendation. In the indirect version, the same topics are introduced in the same order, but no conclusions are drawn about them (the conclusions and the ultimate recommendation appear later, in the body of the report).

TABLE 14.2 Types of Outline Headings

Descriptive (Topical)	Informative (Talking) Outline	
Outline	**Question Form**	**Summary Form**
1. Industry Characteristics	1. What is the nature of the industry?	1. Flour milling is a mature industry.
a. Annual sales	a. What are the annual sales?	a. Market is large.
b. Profitability	b. Is the industry profitable?	b. Profit margins are narrow.
c. Growth rate	c. What is the pattern of growth?	c. Growth is modest.
i. Sales	i. Sales growth?	i. Sales growth averages less than 3 percent a year.
ii. Profit	ii. Profit growth?	ii. Profits are flat.

proposal, whichever is relevant. For those readers who have questions or want more information, later parts of the report provide complete findings and supporting details.

If the audience is unsure about your credibility or is not ready to accept your main idea without first seeing some reasoning or evidence, the indirect approach is a better choice because it gives you a chance to prove your points and gradually overcome audience reservations. Proposals in particular often take the indirect approach to enable the use of AIDA-style persuasion.

When you outline your content, use informative headings rather than simple descriptive headings—doing so helps you think through your content.

When you outline your content, use informative ("talking") headings rather than simple descriptive ("topical") headings (see Table 14.2). Because they are in question or summary form, informative headings force you to really think through the content rather than simply identify the general topic area. Using informative headings can also help with collaborative writing. A heading such as "Industry Characteristics" could mean five different things to the five people on your writing team, so use a heading that conveys a single, unambiguous meaning, such as "Flour milling is a mature industry."

For a quick review of adapting the three-step process to longer documents, refer to "Checklist: Adapting the Three-Step Process to Reports and Proposals." The following sections provide specific advice on how to plan informational reports, analytical reports, and proposals.

CHECKLIST ✓ Adapting the Three-Step Process to Reports and Proposals

A. Analyze the situation.
- Clearly define your purpose before you start writing.
- Prepare a work plan to guide your efforts.

B. Gather information.
- Determine whether you need to launch a separate research project to collect the necessary information.
- Reuse or adapt existing material whenever possible.

C. Select the best combination of medium and channel.
- Base your decision on audience expectations or requirements.
- Consider the need for commenting, revising, distributing, and storing.
- Remember that the medium you choose also sends a message.

D. Organize your information.
- Use the direct approach if your audience is likely to be receptive.
- Use the indirect approach if your audience is likely to be skeptical.

Planning Informational Reports

2 LEARNING OBJECTIVE
List the options for organizing informational reports, and identify the key parts of a business plan.

Informational reports provide the information that employees, managers, and others need to make decisions and take action. These can be grouped into four general categories:

- **Reports to monitor and control operations.** Just as doctors rely on medical reports to see how well the various systems in a patient's body are functioning, business managers rely on a wide range of reports to see how well the various systems in their companies are functioning. *Plans* establish expectations and guidelines to direct future action (see "Creating Successful Business Plans" on page 403). *Operating reports* provide feedback on a wide variety of organizational functions, including

sales, inventories, expenses, shipments, and other aspects of company operations. *Personal activity reports* provide information regarding an individual's experiences during sales calls, industry conferences, market research trips, and other activities.

- **Reports to implement policies and procedures**. *Policy reports* range from brief descriptions of business procedures to manuals that run dozens or hundreds of pages. *Position papers*, sometimes called *white papers* or *backgrounders*, outline an organization's official position on issues that affect the company's success.
- **Reports to demonstrate compliance.** Even the smallest businesses are required to show that they are in compliance with government regulations of one sort or another. Quarterly and annual tax reports such as those filed by John Deere are compliance reports as well.
- **Reports to document progress.** Progress reports range from simple updates to comprehensive reports that include such elements as measured progress toward goals, comparisons of budgeted versus actual expenses, and lists of ongoing concerns and risks.

Informational reports are used to monitor and control operations, to implement policies and procedures, to demonstrate compliance, and to document progress.

Progress reports range from simple, informal updates to comprehensive status reports.

ORGANIZATIONAL STRATEGIES FOR INFORMATIONAL REPORTS

Most informational reports use a **topical organization**, arranging the material by topic in one of the following ways:

- **Comparison.** Showing similarities and differences (or advantages and disadvantages) between two or more entities
- **Importance.** Building up from the least important item to the most important (or from most important to the least, if you don't think your audience will read the entire report)
- **Sequence.** Organizing the steps or stages in a process or procedure
- **Spatial orientation.** Organizing parts of a physical space by their relative locations
- **Chronology.** Organizing a chain of events in order from oldest to newest or vice versa
- **Geography.** Organizing by region, city, state, country, or other geographic unit
- **Category.** Grouping by topical category, such as sales, profit, cost, or investment

A topical organization is built around the content itself, using such arrangements as comparison, importance, sequence, spatial orientation, chronology, geography, or category.

Whichever pattern you choose, use it consistently so that readers can easily follow your discussion from start to finish. Of course, certain reports (such as compliance or monitor-and-control reports) must follow a prescribed flow.

CREATING SUCCESSFUL BUSINESS PLANS

A **business plan** is a comprehensive document that describes a company's mission, structure, objectives, and operations. Roughly speaking, business plans can be written during three separate phases of a company's life: (1) before the company is launched, when the founders are defining their vision of what the company will be; (2) when the company is seeking funding, in which case the business plan takes on a persuasive tone to convince outsiders that investing in the firm would be a profitable decision; and (3) after the company is up and running and the business plan serves as a monitor-and-control mechanism to make sure operations are staying on track.

A *business plan* is a comprehensive document that describes a company's mission, structure, objectives, and operations.

At any stage, a comprehensive business plan forces you to think about personnel, marketing, facilities, suppliers, distribution, and a host of other issues vital to a company's success. The specific elements to include in a business plan can vary based on the situation. Here are the sections typically included in a plan written to attract outside investors:[2]

- **Summary.** In one or two paragraphs, summarize your business concept, particularly the *business model*, which defines how the company will generate revenue and produce a profit. The summary must be compelling, catching the investor's attention and giving him or her reasons to keep reading. Describe your product or service and its market potential. Highlight some things about your company and its leaders that will distinguish your firm from the competition. Summarize your financial projections and indicate how much money you will need from investors or lenders and where it will be spent.

Formal business plans, particularly those used to solicit outside investment, must meet a specific set of reader expectations.

- **Mission and objectives.** Explain the purpose of your business and what you hope to accomplish.
- **Company and industry.** Give full background information on the origins and structure of your venture and the characteristics of the industry in which you plan to compete.
- **Products or services.** Concisely describe your products or services, focusing on their unique attributes and their appeal to customers.
- **Market and competition.** Provide data that will persuade investors that you understand your target market and can achieve your sales goals. Be sure to identify the strengths and weaknesses of your competitors.
- **Management.** Summarize the background and qualifications of the key management personnel in your company. Include résumés in an appendix.
- **Marketing strategy.** Provide projections of sales volume and market share; outline a strategy for identifying and reaching potential customers, setting prices, providing customer support, and physically delivering your products or services. Whenever possible, include evidence of customer acceptance, such as advance product orders.
- **Design and development plans.** If your product requires design or development, describe the nature and extent of what needs to be done, including costs and possible problems. For new or unusual products, you may want to explain how the product will be manufactured.
- **Operations plan.** Provide information on facilities, equipment, and personnel requirements.
- **Overall schedule.** Forecast important milestones in the company's growth and development, including when you need to be fully staffed and when your products will be ready for the market.
- **Critical risks and problems.** Identify significant negative factors and discuss them honestly.
- **Financial projections and requirements.** Include a detailed budget of start-up and operating costs, as well as projections for income, expenses, and cash flow for the first few years of business. Identify the company's financing needs and potential sources, if appropriate.
- **Exit strategy.** Explain how investors will be able to profit from their investment, such as through a public stock offering or a share of ongoing profits.

As Chapter 13's Communication Close-Up on page 373 noted, not everyone believes a conventional business plan is the right approach for every start-up company. If a company still needs to prove the viability of its business model or key product, the time it would take to write a full business plan might be better spent on getting the product or service operational and in front of customers to test its viability. A regular business plan would make more sense after that, when the company needs to transition from start-up to ongoing operations.

Planning Analytical Reports

3 LEARNING OBJECTIVE
Discuss three major ways to organize analytical reports.

Analytical reports are used to assess opportunities, to solve problems, and to support decisions.

The purpose of analytical reports is to analyze, to understand, or to explain—to think through a problem or an opportunity and explain how it affects an organization and how the organization should respond. In many cases, you'll also be expected to make a recommendation based on your analysis. As you saw in Figure 14.1, analytical reports fall into three basic categories:

- **Reports to assess opportunities.** Every business opportunity carries some degree of risk and requires a variety of decisions and actions to capitalize on the opportunity. For instance, *market analysis reports* are used to judge the likelihood of success for new products or sales initiatives by identifying potential opportunities as well as competitive threats and other risks. *Due diligence reports* examine the financial aspects of a proposed decision, such as acquiring another company.
- **Reports to solve problems.** Managers often assign *troubleshooting reports* when they need to understand why something isn't working properly and what can be done to

fix the situation. A variation, the *failure analysis report*, studies events that happened in the past with the hope of learning how to avoid similar failures in the future.

- **Reports to support decisions.** *Feasibility reports* are called for when managers need to explore the ramifications of a decision they're about to make (such as replacing an advertising agency or switching materials used in a manufacturing process). *Justification reports* justify a decision that has already been made.

Check out the "Five-Minute Guide to Planning Reports and Proposals" at the end of the chapter.

Writing analytical reports presents a greater challenge than writing informational reports, for three reasons. First, you're doing more than simply delivering information; you're also analyzing a problem or an opportunity and presenting your conclusions. The best writing in the world can't compensate for flawed analysis. Second, when your analysis is complete, you need to present your thinking in a credible manner. Third, analytical reports often convince other people to make significant financial and personnel decisions, so your reports carry the added responsibility of the consequences of these decisions.

In some situations the problem or opportunity you address may be defined by the person who authorizes the report. In other cases you will have to define it yourself. Moreover, if you're the only person who thinks there is a problem, your readers won't be interested in your solution unless your report first convinces them that a problem exists. As with marketing and sales messages, sometimes you need to "sell the problem" before you can sell the solution.

To help define the problem that your analytical report will address, answer these questions:

Clarify the problem in an analytical report by determining what you need to analyze, why the issue is important, who is involved, where the trouble is located, and how and when it started.

- What needs to be determined?
- Why is this issue important?
- Who is involved in the situation?
- Where is the trouble located?
- How did the situation originate?
- When did it start?

Not all these questions apply in every situation, but asking them helps you define the problem being addressed and limit the scope of your discussion.

Another effective way to tackle a complex problem is to divide it into a series of logical, connected questions, a process called **problem factoring**. You probably subconsciously approach most problems this way. When your car won't start, what do you do? You use the available evidence to organize your investigation and to start a search for cause-and-effect relationships. For example, if the engine doesn't turn over, you might suspect a dead battery. If the engine does turn over but won't fire, you can conclude that the battery is okay, but perhaps you're out of gas. When you speculate on the cause of a problem, you're forming a **hypothesis**, a potential explanation that needs to be tested. By subdividing a problem and forming hypotheses based on available evidence, you can tackle even the most complex situations. With a clear picture of the problem or opportunity in mind, you're ready to consider the best structure for your report.

Use *problem factoring* to divide a complex problem into more manageable pieces.

A *hypothesis* is a potential explanation of the causes of a problem.

Whenever you are preparing an analytical report, make sure you are clear in your own mind about whether you are advocating one particular line of thought or objectively exploring all the available options.[3] Even if advocating one position is appropriate in the circumstances, your readers will expect you to have considered the other options so that you can help them understand why your answer is preferred.

ORGANIZATIONAL STRATEGIES FOR ANALYTICAL REPORTS

When you expect your audience to agree with you, use the direct approach to focus attention on conclusions and recommendations. When you expect your audience to disagree with you or to be hostile, use the indirect approach to focus attention on the rationale behind your conclusions and recommendations.

Before you choose an approach for analytical reports, determine whether your audience is receptive or skeptical.

As Table 14.3 on the next page summarizes, the three most common structural approaches for analytical reports are focusing on conclusions (a direct format), focusing on recommendations (another direct format), and focusing on logical arguments (an indirect format).

TABLE 14.3 Common Ways to Structure Analytical Reports

Element	Focus on Conclusions or Recommendations	Focus on Logical Argument	
		Use 2 + 2 = 4 Model	Use Yardstick Model
Reader mindset	Are likely to accept	Hostile or skeptical	Hostile or skeptical
Approach	Direct	Indirect	Indirect
Writer credibility	High	Low	Low
Advantages	Readers quickly grasp conclusions or recommendations	Works well when you need to show readers how you built toward an answer by following clear, logical steps	Works well when you have a list of criteria (standards) that must be considered in a decision; alternatives are all measured against the same criteria
Drawbacks	Structure can make topic seem too simple	Can make report longer	Readers must agree on criteria; can be lengthy because of the need to address all criteria for every alternative

Focusing on Conclusions

Focusing on conclusions is often the best approach when you're addressing a receptive audience.

When writing for readers who are likely to accept your conclusions—because they've asked you to perform an analysis or they trust your judgment—consider using a direct approach that focuses immediately on your conclusions. This structure communicates the main idea quickly, but it presents some risks. Even if audiences trust your judgment, they may have questions about your data or the methods you used. Moreover, starting with a conclusion may create the impression that you have oversimplified the situation. You're generally better off taking this direct approach in a report only when your credibility is high—when your readers trust you and are willing to accept your conclusions (see Figure 14.5).

In keeping with the direct approach, the report will open with the conclusion that the program is a success.

These two sections will support the conclusion with evidence from two key areas.

This section will complete the story by highlighting areas that still need improvement.

MEASURING QUALITY IMPROVEMENTS

I. Introduction
II. Conclusion: Outsourcing employee training has reduced costs and improved quality
III. Cost reductions
  A. Exceeded 15 percent cost-reduction goal with 22 percent savings in first year
  B. Achieved actual reduction of 22 percent
  C. Reassigned three staffers who used to work on training full-time
  D. Reduced management time needed to oversee training
  E. Sold the computers that used to be reserved for training
IV. Quality improvements
  A. Employees say they are more confident in 7 out of 10 key skill areas
  B. Measurable mistakes have dropped by 12 percent
V. Areas needing improvement
  A. Three skill areas still need improvement
  B. Two trainers received approval ratings below 80 percent
  C. Outside trainers aren't always aware of internal company issues
  D. We have lost some flexibility for scheduling courses
VI. Summary

Figure 14.5 Preliminary Outline of a Research Report Focusing on Conclusions
A year after a bank decided to have an outside firm handle its employee training, an analyst was asked to prepare a report evaluating the results. The analysis shows that the outsourcing experiment was a success, so the report opens with that conclusion but supports it with clear evidence. Readers who accept the conclusion can stop reading, and those who desire more information can continue.

Focusing on Recommendations

When readers want to know what they ought to do, organize your report to focus on recommendations.

A slightly different approach is useful when your readers want to know what they ought to do in a given situation (as opposed to what they ought to conclude). The actions you want your readers to take become the main subdivisions of your report.

When structuring a report around recommendations, use the direct approach as you would for a report that focuses on conclusions. Then unfold your recommendations using a series of five steps:

1. Establish or verify the need for action in the introduction by briefly describing the problem or opportunity
2. Introduce the benefit that can be achieved without providing any details
3. List the steps required to achieve that benefit, using action verbs for emphasis
4. Explain each step more fully, giving details on procedures, costs, and benefits
5. Summarize your recommendations

Whenever a recommendation carries some element of risk, you owe it to your audience to make this clear.

If your recommendation carries any risks, be sure to clearly address them. Doing so not only makes your report more ethical but also offers you some protection if your recommendation is implemented but doesn't work out as you had hoped.

Focusing on Logical Arguments

If readers are likely to be skeptical or hostile to your conclusion or recommendation, build up to it indirectly with a focus on logical arguments.

When readers are likely to be skeptical or hostile to the conclusion or recommendation you plan to make, use an indirect approach. If you guide people along a logical path toward the answer, they are more likely to accept it when they encounter it. The two most common logical approaches are known as the *2 + 2 = 4 approach* and the *yardstick approach*.

The 2 + 2 = 4 Approach The **2 + 2 = 4 approach** is so named because it convinces readers of your point of view by demonstrating that everything adds up. The main points in your outline are the main reasons behind your conclusions and recommendations. You support each reason with the evidence you collected during your analysis.

The *2 + 2 = 4 approach* to logical arguments convinces readers of your point of view by demonstrating that everything adds up.

Because of its natural feel and versatility, the 2 + 2 = 4 approach is an effective and efficient way to develop an analytical report for skeptical readers, so try this structure first. You'll find that many business situations lend themselves nicely to this pattern of logical argumentation.

The Yardstick Approach The **yardstick approach** is useful when you need to use several criteria to evaluate one or more possible solutions. These criteria become the "yardstick" by which you measure the various alternatives. With this approach, you begin by discussing the problem or opportunity and then list the criteria that will guide the decision. The body of the report then evaluates the alternatives against those criteria. The main points of the outline are either the criteria themselves or the alternatives (see Figure 14.6 on the next page). The yardstick approach is particularly useful for proposals when the audience has provided a list of criteria the solution must meet.

The *yardstick approach* compares a solution or several solutions to a set of predetermined criteria.

The yardstick approach has two potential drawbacks. First, if your readers don't agree with the criteria you're using in your analysis, they won't agree with the results of the evaluation. If you have any doubt about their agreement with the criteria you plan to use, build consensus before you start your report, if possible, or take extra care to explain why the criteria you're using are the best ones to use.

When using the yardstick approach, make sure readers will agree with the criteria you are using to evaluate the option(s).

Second, the yardstick approach can get tedious when you have many options to consider or many criteria to compare them against. One way to minimize repetition is to compare the options in tables and then highlight the most unusual or important aspects of each alternative in the text so that you get the best of both worlds. This approach allows you to compare all the alternatives against the same yardstick while calling attention to the most significant differences among them.

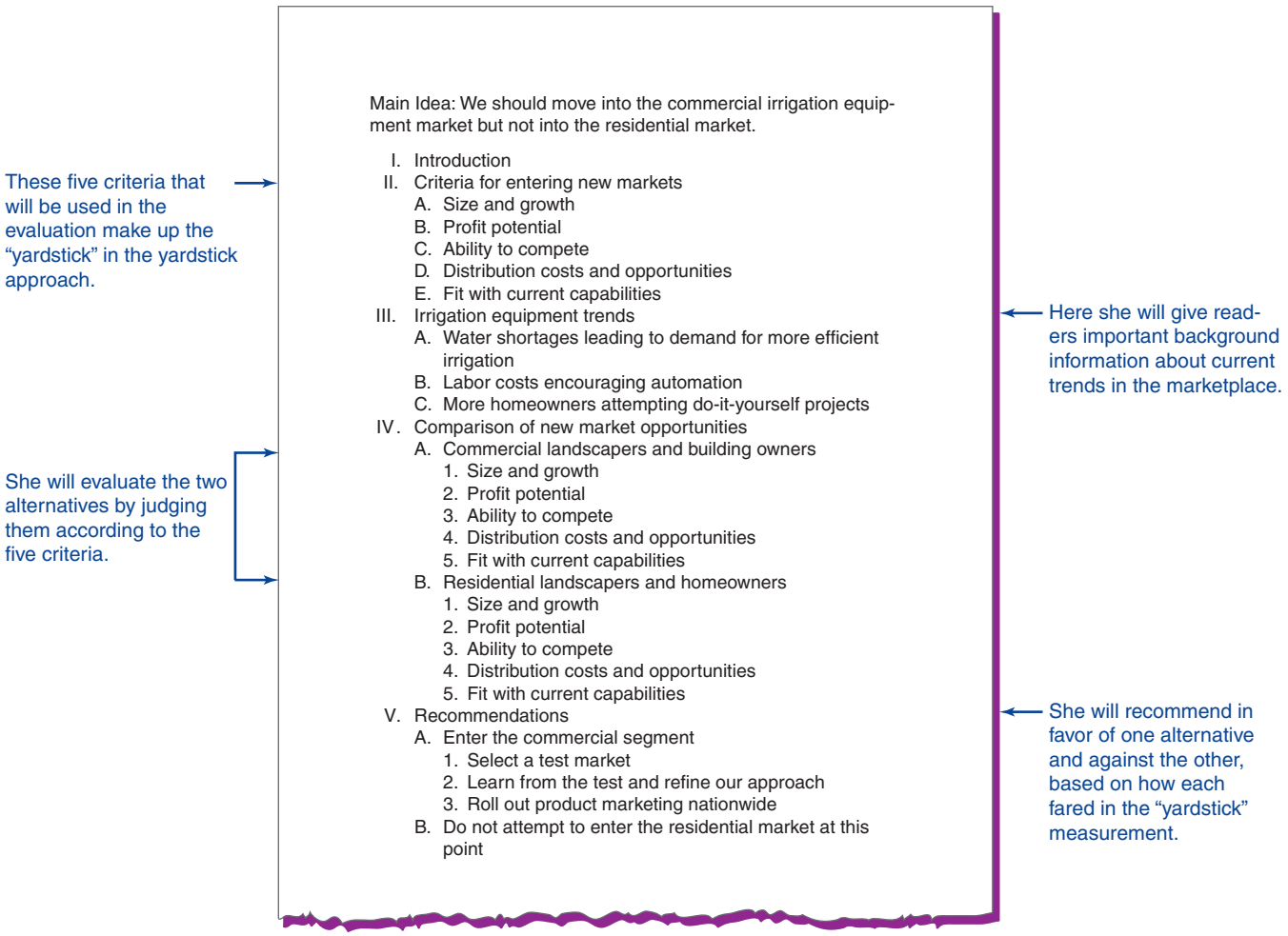


Figure 14.6 Outline of an Analytical Report Using the Yardstick Approach
This report was drafted by a market analyst for a company that makes irrigation equipment for farms and ranches. The company has been so successful in the agricultural market that it is starting to run out of potential customers. To keep growing, it needs to find another market. Two choices to consider were commercial buildings and residences, and management needed to evaluate both carefully before deciding.

EFFECTIVE ANALYTICAL REPORTS: AN EXAMPLE

As national sales manager of a New Hampshire sporting goods company, Binh Phan was concerned about his company's ability to sell to its major accounts, the giant national chains that now dominate retailing. Even though these customers are getting bigger, the company's sales to them are dropping, and it's critical to figure out why and propose a solution. Phan's boss, the vice president of marketing, asked Phan to analyze the situation and make a recommendation.

Phan's troubleshooting report appears in Figure 14.7 on pages 409–410. The main idea is that the company should establish a separate sales team for each of these major national accounts rather than continuing to service them through the company's four regional divisions. Phan knew his plan would be controversial because it requires a big change in the company's organization and in the way sales reps are paid. His thinking had to be clear and easy to follow, so he used the 2 + 2 = 4 approach to focus on his reasons.

Planning Proposals

4 LEARNING OBJECTIVE
Explain how to choose an organizational strategy when writing a proposal.

Proposals are written for both internal and external audiences. Internal proposals request decisions from managers within the organization, such as proposals to buy new equipment or launch new research projects. Examples of external proposals include

grant proposals, which request funds from government agencies and other sponsoring organizations, and *sales proposals*, which suggest individualized solutions for potential customers and request purchase decisions.

The most significant factor in planning any proposal is whether the intended recipient has asked you to submit a proposal. *Solicited proposals* are generally prepared at the request of external parties that require a product or a service, but they may also be requested by such internal sources as management or the board of directors. When organizations require complex products, services, or systems, they often prepare a formal invitation to bid on the contract, called a **request for proposals** (**RFP**), which includes instructions that specify exactly the type of work to be performed or products to be delivered along with budgets, deadlines, and other requirements. To attract a large pool of qualified bidders, organizations send RFPs to firms with good records of performance in the field, print them in trade publications, and post them on the web.

Buyers often solicit proposals by publishing a *request for proposals (RFP)*.

To write a proposal in response to an RFP, begin by reviewing the requirements. Next, define the scope of the deliverables, determine the methods and procedures to be

The first paragraph verifies who requested the report, when it was requested, and who wrote it.

This section explains how the information used in the analysis was collected.

Phan describes the first problem and explains how it occurred, without blaming anyone personally.

MEMO

TO: Robert Mendoza, Vice President of Marketing
FROM: Binh Phan, National Sales Manager BP
DATE: September 14, 2021
SUBJECT: Major accounts sales problems

As you requested on August 20, this report outlines the results of my investigation into the recent slowdown in sales to major accounts and the accompanying rise in sales- and service-related complaints from some of our largest customers.

Over the last four quarters, major account sales dropped 12%, whereas overall sales were up 7%. During the same time, we've all noticed an increase in both formal and informal complaints from larger customers regarding how confusing and complicated it has become to do business with us.

The second paragraph highlights the serious nature of the problem.

My investigation started with in-depth discussions with the four regional sales managers, first as a group and then individually. The tension I felt in the initial meeting eventually bubbled to the surface during my meetings with each manager. Staff members in each region are convinced that other regions are booking orders they don't deserve, with one region doing all the legwork only to see another region get the sale, the commission, and the quota credit.

I followed up these formal discussions by talking informally and exchanging email with several sales representatives from each region. Virtually everyone who is involved with our major national accounts has a story to share. No one is happy with the situation, and I sense that some reps are walking away from major customers because the process is so frustrating.

The decline in sales to our major national customers and the increase in their complaints stem from two problems: (1) sales force organization and (2) commission policy.

ORGANIZATIONAL PROBLEMS

Organizational problems are the first "2" in Phan's 2 + 2 = 4 approach.

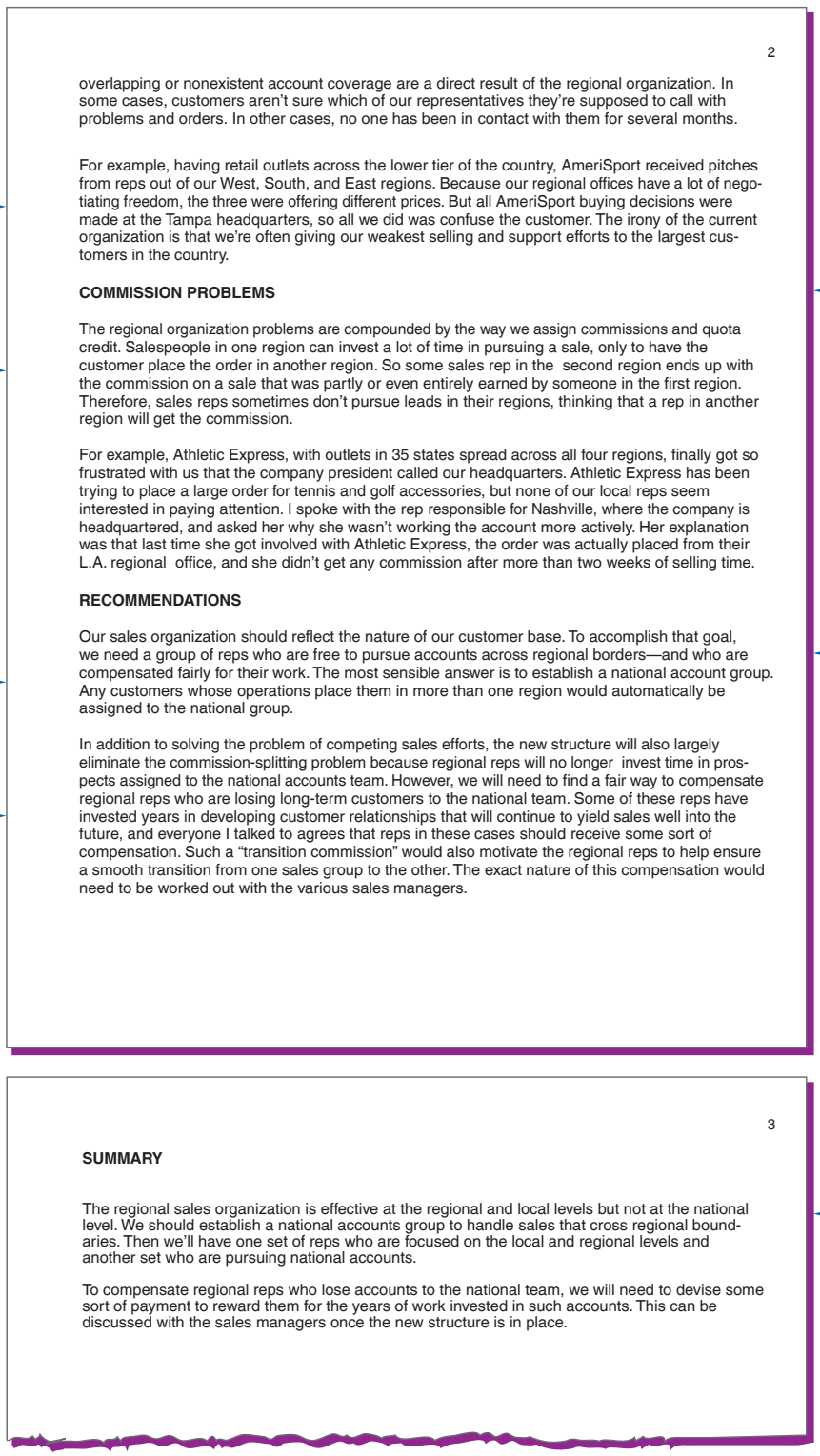
When we divided the national sales force into four geographical regions last year, the idea was to focus our sales efforts and clarify responsibilities for each prospective and current customer. The regional managers have gotten to know their market territories very well, and sales have increased beyond even our most optimistic projections.

However, while solving one problem, we have created another. In the past 12 to 18 months, several regional customers have grown to national status, and a few retailers have taken on (or expressed interest in) our products. As a result, a significant portion of both current sales and future opportunities lies with these large national accounts.

I uncovered more than a dozen cases in which sales representatives from two or more regions found themselves competing with each other by pursuing the same customers from different locations. Moreover, the complaints from our major accounts about

(continued)

Figure 14.7 Analytical Report Using the 2 + 2 = 4 Approach
The 2 + 2 = 4 approach lets this writer present a logical argument that is both clear and compelling.



2

overlapping or nonexistent account coverage are a direct result of the regional organization. In some cases, customers aren't sure which of our representatives they're supposed to call with problems and orders. In other cases, no one has been in contact with them for several months.

For example, having retail outlets across the lower tier of the country, AmeriSport received pitches from reps out of our West, South, and East regions. Because our regional offices have a lot of negotiating freedom, the three were offering different prices. But all AmeriSport buying decisions were made at the Tampa headquarters, so all we did was confuse the customer. The irony of the current organization is that we're often giving our weakest selling and support efforts to the largest customers in the country.

COMMISSION PROBLEMS

The regional organization problems are compounded by the way we assign commissions and quota credit. Salespeople in one region can invest a lot of time in pursuing a sale, only to have the customer place the order in another region. So some sales rep in the second region ends up with the commission on a sale that was partly or even entirely earned by someone in the first region. Therefore, sales reps sometimes don't pursue leads in their regions, thinking that a rep in another region will get the commission.

For example, Athletic Express, with outlets in 35 states spread across all four regions, finally got so frustrated with us that the company president called our headquarters. Athletic Express has been trying to place a large order for tennis and golf accessories, but none of our local reps seem interested in paying attention. I spoke with the rep responsible for Nashville, where the company is headquartered, and asked her why she wasn't working the account more actively. Her explanation was that last time she got involved with Athletic Express, the order was actually placed from their L.A. regional office, and she didn't get any commission after more than two weeks of selling time.

RECOMMENDATIONS

Our sales organization should reflect the nature of our customer base. To accomplish that goal, we need a group of reps who are free to pursue accounts across regional borders—and who are compensated fairly for their work. The most sensible answer is to establish a national account group. Any customers whose operations place them in more than one region would automatically be assigned to the national group.

In addition to solving the problem of competing sales efforts, the new structure will also largely eliminate the commission-splitting problem because regional reps will no longer invest time in prospects assigned to the national accounts team. However, we will need to find a fair way to compensate regional reps who are losing long-term customers to the national team. Some of these reps have invested years in developing customer relationships that will continue to yield sales well into the future, and everyone I talked to agrees that reps in these cases should receive some sort of compensation. Such a "transition commission" would also motivate the regional reps to help ensure a smooth transition from one sales group to the other. The exact nature of this compensation would need to be worked out with the various sales managers.

3

SUMMARY

The regional sales organization is effective at the regional and local levels but not at the national level. We should establish a national accounts group to handle sales that cross regional boundaries. Then we'll have one set of reps who are focused on the local and regional levels and another set who are pursuing national accounts.

To compensate regional reps who lose accounts to the national team, we will need to devise some sort of payment to reward them for the years of work invested in such accounts. This can be discussed with the sales managers once the new structure is in place.

Figure 14.7 Analytical Report Using the 2 + 2 = 4 Approach (*Continued*)

used, and estimate time requirements, personnel requirements, and costs. Then put it all in writing—exactly as specified in the RFP, following the precise format it requires and responding meticulously to every point it raises.[4] RFPs can seem surprisingly picky, even to the point of specifying the paper size for the proposal and the number of copies to send, but you must follow every detail.

Unsolicited proposals are written without a specific invitation from a potential client. Such proposals may also be initiated by employees or managers who want to convince company insiders to adopt a program, a policy, or an idea. In other words, with an unsolicited proposal, the writer makes the first move. Even so, an unsolicited proposal should not come as a surprise to the recipient, but rather should be the summation of an ongoing conversation between the sender and the recipient.[5] This approach helps ensure acceptance, and it gives you an opportunity to explore the recipient's needs and craft your proposal around them.

Unsolicited proposals are written without a specific invitation from a potential client.

Unsolicited proposals differ from solicited proposals in another important respect: Your audience may not be aware of the problem you are addressing, so your proposal must first convince readers that a problem or an opportunity exists and that it is significant enough to warrant action.

Unsolicited proposals require additional persuasive elements because the audience isn't expecting the proposal and might not even be conscious of the problem you propose to solve.

With virtually any proposal, keep in mind that you are always competing for something—money, time, management attention, and so on. Even if yours is the only proposal on the table, you are still competing with all the other choices your audience members could make with their time, money, and attention.

Every proposal competes for something: money, time, attention, and so on.

Proposals can be significant writing projects, particularly when you are responding to a complex RFP. Fortunately, a variety of software products are available to considerably lighten the load. Basic features include the ability to automatically personalize the proposal, ensure proper structure, and organize storage of all your boilerplate material (identical sections of text used in every proposal, such as a description of your company). At a more advanced level, semiautomated proposal-writing systems can scan RFPs to identify questions and requirements and fill in potential answers from a centralized knowledge base that contains input from all the relevant experts in your company.[6]

ORGANIZATIONAL STRATEGIES FOR PROPOSALS

Your choice of structure for proposals depends on whether the proposal is solicited and, if so, whether you expect readers to be receptive to your specific recommendation. In general, your audience is likely to be more receptive to solicited proposals because the problem and the solution have already been identified. Submit your proposal for the solution specified in the RFP, and structure the proposal using the direct approach to focus on your recommendation. As soon as possible within the constraints of the RFP requirements, identify why your solution is unique and deserves close consideration.[7]

Depending on the circumstances and your relationship with the recipient, the indirect approach is often better for unsolicited proposals. When writing unsolicited proposals, you must first convince the audience that a problem exists and establish your credibility if you are unknown to the reader. At the same time, you need to give the reader a compelling reason to keep reading a document that he or she didn't request. Follow the AIDA model or a similar approach to grab the reader's attention quickly. For an external proposal, for instance, you might start off with an attention-getter such as "In working with other companies in your industry, our productivity specialists were able to reduce their operating costs by as much as 15 percent." Then, to convince the reader that you can back up that claim, present your solution in a logical fashion, with solid evidence, leading up to a request for a decision (see "Ethics Detective: Solving the Case of the Overblown Proposal").

The indirect approach following AIDA or a similar model is often the best way to build your case in an unsolicited proposal.

EFFECTIVE PROPOSALS: AN EXAMPLE

A good proposal explains why a project or course of action is needed, what it will involve, and how the recipient will benefit. In Figure 14.8 on pages 413–416, a human resources manager responded to a request from his boss to explore ways to address three troublesome workforce issues. During his investigation, he discovered a better approach than the company had been considering, and that became the subject of his proposal.

ETHICS DETECTIVE

Solving the Case of the Overblown Proposal

As the manager in charge of your company's New Ventures Group, you've read your share of proposals—hundreds, maybe thousands, of them. You've developed a sixth sense about these documents, an ability to separate cautious optimism from self-doubt and distinguish justified enthusiasm from insupportable hype.

Your company invests in promising smaller firms that could grow into beneficial business partners or even future acquisitions. In a typical scenario, a small company invents a new product but needs additional funding to manufacture and market it, so the owners approach you with funding proposals. Because you make the first major decision in this investment process, your choices and recommendations to the board of directors are crucial.

Moreover, the risks are considerable: If one of your recommendations doesn't pan out, the company could lose all the money it invested (often millions), and that's only the start. Failures consume your team's time and energy and can even put the company at risk for shareholder lawsuits and other serious headaches. In other words, mistakes in your line of work are costly.

The proposal in front of you today is intriguing. A small company in Oklahoma has designed a product called the Wireless Shopping List, and you think the idea might appeal to upscale homeowners. Small touch screens are placed around the house, wherever occupants are likely to think of things they need to buy on the next shopping trip: on the refrigerator door, in the media room, in the nursery, in the garage, in the gardening shed. The system collects all these inputs and, on command, prints out a shopping list or downloads it to a smartphone. It's a clever idea, but one paragraph in the proposal bothers you:

> Everybody in our test market audience was absolutely stunned when we demonstrated the simulated system. They couldn't believe something like this was even possible. It was so handy and so convenient—everyone said it would change their lives forever. We haven't even specified the price yet, but every single person in the room wanted to place an order, on the spot.

ANALYSIS

1. This proposal potentially oversells the idea in at least three ways. Identify them and explain how they could lead you to decline the investment opportunity.

memo

CORPORATE HR

TO: Lailah Banks
FROM: Roger Hemmings
DATE: May 5, 2021
SUBJECT: Addressing Our High-Priority Personnel Issues

As you requested after last month's State of the Workforce meeting, I've been exploring potential responses to the top three personnel issues the team identified: job satisfaction, position readiness, and succession planning. We were all concerned about the cost and time commitment required to tackle these big issues, so the consensus reached at the meeting was to prioritize the issues and address them one at a time.

However, I believe there is a manageable way to address all three issues at once.

Areas of Concern: Finding Common Threads

The "big three" issues definitely feel overwhelming when we consider the changes needed in order to make meaningful improvements in all of them. There is hope in the details, however. Common threads run through all three areas, and we can address many of the problems with a single solution.

To review the three issues:

- **Job satisfaction:** Results from the last four internal surveys show a disturbing pattern of dissatisfaction, with many employees expressing uncertainty about where their careers are heading, confusion about how they fit into the big picture, and anger about not being given fair consideration for promotions.
- **Position readiness:** Managers frequently complain to us that our emphasis on promoting from within is difficult for them to adhere to because they can't find enough employees who are ready to move into positions of greater responsibility. Employees usually have the technical skills, but managers say that many lack the vision to see how their individual efforts contribute to the larger effort or lack the professionalism needed to function at a high level around customers, executives, and business partners.
- **Succession planning:** This has been a priority for several years, but we never seem to make much headway toward putting a real program in place. We've solved one side of the equation—identifying all the critical managerial and professional roles where we're vulnerable to employees leaving or being promoted—but we haven't figured out how to identify and prepare promising candidates to move into these positions.

As I dug through these issues, two themes kept popping up: a lack of shared purpose and inadequate relationship building.

The subject line establishes a connection to a topic previously discussed without divulging the main idea of the proposal (which uses the indirect approach).

The opening paragraph serves as a reminder of their previous discussion, the task he was given, and the expectations about how he would approach it.

This single-sentence paragraph is the attention-getter in the AIDA model; it promises a solution that is better than expected.

This section summarizes the previous discussion while laying the groundwork for introducing a key reason for the proposal he is going to make, which is that he has found a couple of common themes in the three areas of concern.

He introduces those two themes, which shape the proposal he is about to make. This works as the interest stage of the AIDA model, since it presents an intriguing and unexplored angle on issues previously discussed.

(continued)

Figure 14.8 Internal Proposal
The manager in charge of his company's employee development efforts has a solution to three worrisome workforce issues that he has previously discussed with his boss, the director of human resources. He uses this memo-format proposal to outline a new employee mentoring program and suggest how the company can get started on it.[9]

The Lack of Shared Purpose

The company has always prided itself on attracting the best people in every functional specialty, but I believe this has resulted in an overemphasis on hard skills and individual output, to the detriment of soft skills and an overall sense of teamwork and shared contribution. It's no surprise that so many employees feel adrift and disconnected, when we don't foster a communal sense of how the company functions as an integrated enterprise. We have some of the brightest employees in the industry, but many are too focused on the tactics of their own jobs.

Here he offers more information about the two themes he discovered as he continues to lay out the reasons for his proposed solution.

Inadequate Relationship Building

After reviewing the employee survey data, I wanted to get a more personal take on these issues, so I interviewed more than two dozen professional staffers and managers across all divisions. These interviews uncovered another troubling dynamic: We're not very good at building professional relationships throughout the organization.

Employees and their managers tend to stay isolated within their functional silos and don't seem to understand or even care about the challenges faced by their colleagues in other departments. One market analyst described cross-functional meetings as "strangers forced to cooperate with strangers." Managers trying to fill promotional opportunities sometimes don't know where to look because they rarely get to know employees outside their own chain of command. And every professional staffer I talked to expressed some variation of feeling lost, with no one to turn to for confidential career advice.

Proposed Solution: Employee Mentoring

Clearly, we have some challenges on our hands. The good news is that we have the potential to solve many of them with an employee mentoring program. Here is a brief overview of mentoring programs, their benefits, potential stumbling blocks, and a recommended strategy for launching our own program.

At this point, he is ready to shift from "selling the problem" and laying the groundwork to presenting his solution.

Common Features of Mentoring Programs

Here are the key features common to most mentoring programs:

- It's a formal program that matches interested employees with managers and senior professional staff in one-on-one coaching relationships. The coaching can involve job-specific challenges, work-life balance, workplace conflicts, or anything else the participants decide is useful.
- Employees and their mentors meet or at least talk on a regular schedule. Continuity is essential.
- HR provides the "matchmaking service" to help find the optimum pairings and manage demand, but isn't involved in the actual mentoring.
- Mentoring relationships are confidential, giving both sides the freedom to talk openly.

This brief overview of employee mentoring programs establishes common ground with his reader, so he can be sure they are thinking about the same thing.

(continued)

Figure 14.8 **Internal Proposal (*Continued*)**

Potential Benefits of Mentoring Programs

Mentoring can go a long way toward solving these problems of shared purpose and relationship building, but companies report an even wider range of benefits from their mentoring programs:

- Employees can learn how to professionally navigate the corporate environment, from subtle issues such as business etiquette to broader questions such as how they contribute to company growth.
- Employees can discuss problems and worries with a trusted advisor, without fear of retribution.
- Managers gain insights into the challenges employees are facing, beyond the tactical demands of their jobs, which will help them manage and lead more effectively.
- Managers and employees learn about the challenges and contributions of other functional areas, which will foster better cooperation between departments.
- Through their mentors, employees can meet other managers, executives, and influential senior staff, expanding their networks within the company and opening more career doors.
- Managers can monitor the progress of promising employees and guide them into new opportunities.
- As an employee benefit, mentoring can help us attract a wider and more diverse pool of outside job candidates.
- Mentoring can boost productivity by helping employees find the best ways to invest their time and creative energy.
- Proactive mentoring can help the company get the full potential from employees who don't feel like they are part of the "in crowd" within the company.
- Through "reverse mentoring," senior staff and managers may have opportunities to learn about digital media use and other valuable skills they haven't had to embrace in their careers.

The bottom-line impact of mentoring programs isn't always easy to measure, but my research found some compelling figures. For example, companies have seen turnover drop by as much as 20 percent in the year after mentoring was launched, and the majority of employees and mentors alike report improved job satisfaction as a result of being involved in mentoring.

← Here he presents the general benefits of mentoring programs in a way that connects them to the two themes he identified earlier.

← Sharing the positive outcomes that other companies have experienced should heighten his boss's desire to explore the possibility of starting a program.

(continued)

Figure 14.8 **Internal Proposal (*Continued*)**

Costs and Potential Challenges

The benefits of mentoring do need to be weighed against costs and some potential challenges:

- Many companies find themselves with more interested employees than their programs can support, so we need to manage the demand in a fair and transparent way.
- There will be some direct and indirect costs, including training for mentors, an automated system for matching mentors with employees as the program scales up, and clerical and supervisory workload for HR.
- Mentoring requires time and energy, so mentors' workloads will need to be adjusted accordingly.
- Mentoring can create conflicts with employees' direct supervisors, so HR will need to offer mediation.

He is open about the downsides of mentoring programs, which addresses some potential objections and helps maintain his credibility on the subject.

We can predict some of these costs and complexities, but the most accurate way to assess them will be to run a pilot program, as I propose in the next section.

Next Steps: Develop a Business Case and Launch a Pilot Program

"Next steps" signals his shift to the action phase of the AIDA model. He outlines a brief plan to move forward and concludes by asking for a meeting to get things started.

The research makes a clear case for mentoring, provided it is planned carefully and managed well. I propose that we develop a formal business case for a mentoring program and present it to the Executive Council. We need top-down support and the participation of executives themselves as mentors, so C-level buy-in is essential.

Rather than launching companywide, I think we should start with a limited pilot program, with perhaps two or three dozen participants. This will let us fine-tune the program and get a clearer estimate of costs in order to refine budgets before scaling up.

My rough estimate is that the pilot program will require one full-time staff member in HR to facilitate matchmaking, mediate conflicts, analyze results, and plan the companywide rollout. This new position will have a loaded cost of approximately $90k. I shouldn't have any problem clearing out this much in my operating budget, probably by canceling the lowest-rated training courses (as we've been discussing doing anyway).

Can I get on your calendar sometime next week to go over the potential structure of the program and answer any questions or concerns you may have?

Figure 14.8 **Internal Proposal (*Continued*)**

COMMUNICATION CHALLENGES AT John Deere

You work as a communication specialist in John Deere's investor relations department. You and your colleagues have just finished the mammoth task of producing last year's annual report. Now it's time to get the word out. Using the skills you've been practicing in this course, respond to these challenges.

INDIVIDUAL CHALLENGE: Locate one of John Deere's recent annual reports on the company's website at investor.deere.com/home. Read the front end of the report, particularly the *Chairman's Message*, and then write a one-paragraph summary of key highlights that you think would be most interesting to potential investors. This paragraph could be included in a press release that would be sent to financial journalists and investors. (A note on the company name in case of confusion: The legal name of the corporation is Deere & Company, but it refers to itself in most public communication as John Deere.)

TEAM CHALLENGE: With a team assigned by your instructor, read the front end of one of John Deere's recent annual reports as in the individual challenge. Now your challenge will be to write two sets of five tweets (each 280 characters maximum) with highlights from the report. The first set will be addressed to investors, so focus on financial results and prospects for the coming years. The second set will be addressed to all the company's stakeholders, with an eye on promoting John Deere as a responsible corporate citizen, so choose tweetable points to support this message. Think broadly about the company's role in food production and other sectors of the economy. Email your tweets to your instructor or post them on your class blog, as directed.

Key Terms

analytical reports Reports that offer both information and analysis; they can also include recommendations
business plan A comprehensive document that describes a company's mission, structure, objectives, and operations
hypothesis A potential explanation that needs to be tested
informational reports Reports that offer data, facts, feedback, and other types of information without analysis or recommendations
problem factoring Dividing a problem into a series of logical, connected questions
proposals Reports that combine information delivery and persuasive communication
request for proposals (RFP) A formal invitation to bid on a contract
statement of purpose Planning statement that defines why you are preparing a report
topical organization Arrangement of material according to comparisons, importance, sequence, spatial orientation, chronology, geography, or category
yardstick approach Logical argumentation approach that uses several criteria to evaluate one or more possible solutions
2 + 2 = 4 approach Logical argumentation approach that convinces readers of your point of view by demonstrating how everything "adds up"

Summary Of Learning Objectives

1 Adapt the three-step writing process to reports and proposals. The comprehensive nature of the three-step process is ideal for the work involved in reports and proposals. Use all the advice you learned in Chapters 4 through 6 with added emphasis on a few specific points for longer documents: (1) Identify your purpose clearly to avoid rework, (2) prepare a work plan to guide the research and writing tasks, (3) determine whether a separate research project might be needed to gather the necessary information, (4) choose the best combination of medium and channel, and (5) organize your information by selecting the best approach for an informational or analytical report.

2 List the options for organizing informational reports, and identify the key parts of a business plan. Informational reports focus on the delivery of facts, figures, and other types of information. Most informational reports use a topical organization, arranging material by comparison, importance, sequence, spatial orientation, chronology, geography, or category.

Formal business plans—those that are shown to outside audiences, such as investors and bankers—typically contain the following elements: a summary of the business concept, the company's mission and objectives, background on the company and the industry in which it competes, descriptions of its products and services, an analysis of target markets and key competitors, a discussion of the management team, a summary of the marketing strategy, design and development plans, an operations plan, a schedule with major milestones, an analysis of critical risks and problems, financial projections and requirements, and a description of the proposed exit strategy.

3 Discuss three major ways to organize analytical reports. The three most common ways to organize analytical reports are by focusing on conclusions, focusing on recommendations, and focusing on logical arguments. The first two are direct approaches; the third is an indirect approach.

4 Explain how to choose an organizational strategy when writing a proposal. The most significant factor in planning a proposal is whether the proposal is solicited or unsolicited. Solicited proposals are obviously expected and welcomed by the recipient, but they often must follow a

specific organization, particularly when they are submitted in response to a request for proposals (RFP). For unsolicited proposals, the writer has flexibility in choosing the most effective organization, format, and content. With unsolicited proposals, the writer often needs to explain why the solution offered in the proposal is even necessary for the reader to consider. Because of this, the indirect approach is usually preferred for unsolicited proposals.

Test Your Knowledge

To review chapter content related to each question, refer to the indicated Learning Objective.

14-1. What is the major difference between informational and analytical reports? [LO-1]
14-2. What does a statement of purpose convey? [LO-1]
14-3. What should you include in the work plan for a complex report or proposal? [LO-1]
14-4. What elements should be included in a formal business plan? [LO-2]
14-5. How are reports for monitoring and controlling operations used? [LO-2]
14-6. What are the three major ways to organize an analytical report? [LO-3]
14-7. How does a feasibility report differ from a justification report? [LO-3]
14-8. What is problem factoring? [LO-3]
14-9. What is an RFP, and how does it relate to proposal writing? [LO-4]
14-10. When responding to an RFP, should you try to stand out from the crowd by organizing and formatting your proposal in a fresh, unexpected way? Explain your answer. [LO-4]

Apply Your Knowledge

To review chapter content related to each question, refer to the indicated Learning Objective.

14-11. Would "Look into employee morale problems" be an effective problem statement for a report? Why or why not? [LO-1]
14-12. Which of the topical organization plans listed on page 403 would you use to organize an analytical report on a recent power outage in your manufacturing facility? Why? [LO-2]
14-13. If you want to make a particular recommendation in your report, should you include information that might support a different recommendation? Explain your answer. [LO-3]
14-14. Assume you are assigned the task of evaluating two firms to provide security for your company's office and factory facilities, but your analysis tells you that neither firm can provide quality service at an acceptable cost. How should you structure your report? [LO-3]
14-15. In what ways are unsolicited proposals more challenging to write than solicited proposals? [LO-4]

Practice Your Skills

Message for Analysis

14-16. Comparing Two Report Formats [LO-1] The Securities and Exchange Commission (SEC) requires all public companies to digitally file a comprehensive annual report (form 10-K). Many companies post links to these reports on their websites, along with links to other company reports. Visit the website of any public corporation and find the company's most recent 10-K and Fiscal Year in Review reports. Compare the style and format of the two reports. For which audience(s) is the Year in Review targeted? Who besides the SEC might be interested in the 10-K? Which report do you find easier to read? More interesting? More detailed?

Exercises

Each activity is labeled according to the primary skill or skills you will need to use. To review relevant chapter content, you can refer to the indicated Learning Objective. In some instances, supporting information will be found in another chapter, as indicated.

14-17. Planning: Analyzing the Situation [LO-1] Sales at The Style Shop, a clothing store for men, have declined for the third month in a row. Your boss is not sure whether this decline is due to the weak economy or some other unknown reason. She has asked you to investigate the situation and to submit a report to her, highlighting some possible reasons for the decline. Develop a statement of purpose for your report.
14-18. Planning: Preparing the Work Plan [LO-1] South by Southwest (SXSW) is a family of conferences and festivals in Austin, Texas, that showcase some of the world's most creative talents in music, interactive media, and film. In addition to being a major entertainment venue for a week every March, SXSW is also an increasingly important *trade show*, an opportunity for companies to present products and services to potential customers and business partners. You work for a company that makes music training equipment such as an electronic keyboard with an integrated computer screen that guides learners through every step of learning to play a keyboard. Your manager has asked you to look into whether the company should rent an exhibition booth at SXSW next year. Prepare a work plan for an analytical report that will assess the promotional opportunities at SXSW and make a recommendation on exhibiting. Include the statement of purpose, a problem statement for any research you will conduct, a description of what will result from your investigation, the sources and methods of data collection, and a preliminary outline. Visit the SXSW website (**www.sxsw.com**) for more information.[8]

Planning: Organizing Reports [LO-1] For each of the following scenarios, determine whether the direct or indirect approach would be advisable, and explain why.

14-19. A monthly financial report prepared by the accounting department for upper management

14-20. An accountant fresh out of college who wants to propose a new way to present those monthly financial results to upper management

14-21. An unsolicited proposal to provide payroll processing services

14-22. An analytical report, requested by the CEO, explaining why the company has been losing money in the eastern sales region for the past two years

14-23. An unsolicited proposal to the board of directors, outlining why it makes strategic sense for your company to expand into international markets; the board rejected a similar—but poorly presented—idea last year

14-24. **Planning: Organizing Reports** [**LO-1**] Look through recent issues (print or online) of *Bloomberg Businessweek*, *Fortune*, or other business publications for an article that describes how an executive's conclusions about his or her company's current situation or future opportunities led to changes in policy, plans, or products. Construct an outline of the material, first using a direct approach and then using an indirect approach. Which approach do you think the executive would use when reporting these conclusions to stockholders? When reporting to other senior managers? Explain your answers.

14-25. **Planning: Organizing Reports** (**Informational Reports**) [**LO-2**] Assume that your college president has received many student complaints about campus parking problems. You are appointed the chair of a student committee organized to investigate the problems and recommend solutions. The president gives you a file labeled "Parking: Complaints from Students," and you jot down the essence of the complaints as you inspect the contents. Your notes look like this:

- Inadequate student spaces at critical hours
- Poor night lighting near the computer center
- Inadequate attempts to keep resident neighbors from occupying spaces
- Dim marking lines
- Motorcycles taking up full spaces
- Discourteous security officers
- Spaces (often empty) reserved for college officials
- Relatively high parking fees
- Full fees charged to night students even though they use the lots only during low-demand periods
- Vandalism to cars
- A sense of personal danger
- Inadequate total space
- Resident harassment of students parking on the street in front of neighboring houses

Prepare an outline for an informational report to be submitted to committee members. Use a topical organization that categorizes this information.

Planning: Organizing Reports (**Analytical Reports**) [**LO-2**] Three years ago, your company (a carpet manufacturer) modernized its Georgia plant in anticipation of increasing demand for carpets. Because of the depressed housing market, the increase in demand for new carpets has been slow to materialize. As a result, the company has excess capacity at both its Georgia and California plants. On the basis of your research, you have recommended that the company close the California plant. J. P. Lawrence, the company president, has asked you to prepare a justification report to support your recommendation. Here are the facts you gathered by interviewing the respective plant managers:

Operational Statistics

- Georgia plant: This plant has newer equipment, has higher productivity, employs 100 nonunion production workers, and ships $12 million in carpets a year; hourly base wage is $16
- California plant: California plant employs 80 union production workers and ships $8 million in carpets a year; hourly base wage is $20

Financial Implications

- Savings by closing California plant: (1) increase productivity by 17 percent; (2) reduce labor costs by 20 percent (total labor savings would be $1 million per year; see assumptions); (3) annual local tax savings of $120,000 (Georgia has a more favorable tax climate)
- Sale of Pomona, California, land: Purchased in 1952 for $200,000. Current market value $2.5 million. Net profit (after capital gains tax) more than $1 million
- Sale of plant and equipment: Fully depreciated; any proceeds a windfall
- Costs of closing California plant: One-time deductible charge of $250,000 (relocation costs of $100,000 and severance payments totaling $150,000)

Assumptions

- Transfer five workers from California to Georgia
- Hire 45 new workers in Georgia
- Lay off 75 workers in California
- Georgia plant would require a total of 150 workers to produce the combined volume of both plants

14-26. Which approach (focus on conclusions, recommendations, or logical arguments) will you use to structure your report to the president? Why?

14-27. Suppose this report were to be circulated to plant managers and supervisors instead. What changes, if any, might you make in your approach?

14-28. List some conclusions you might draw from the preceding information to use in your report.

14-29. Using the structure you selected for your report to the president, draft a final report outline with first- and second-level informative headings.

Planning Reports and Proposals [**LO-2**], [**LO-3**], [**LO-4**] Using the information presented in this chapter, identify the report type represented by each of the following examples. In addition, write a brief paragraph about each, explaining who the audience is likely to be, what type of data would be used, and whether conclusions and recommendations would be appropriate.

14-30. A statistical study of the pattern of violent crime in a large city during the past five years

14-31. A report prepared by a seed company, demonstrating the benefits of its seed corn for farmers

14-32. A report prepared by an independent testing agency, evaluating various types of nonprescription cold remedies

14-33. A trip report submitted at the end of a week by a traveling salesperson

14-34. A report indicating how 45 acres of undeveloped land could be converted into an industrial park

14-35. An annual report to be sent to the shareholders of a large corporation

14-36. A report from a U.S. National Park wildlife officer to Washington, D.C., headquarters showing the status of an endangered animal species

14-37. A report outlining the risks of closing a chain of retail stores and moving the entire business online

14-38. **Planning Informational Reports** [LO-2] You're the vice president of operations for a Florida fast-food chain. In the aftermath of a major hurricane, you're drafting a report on the emergency procedures to be followed by personnel in each restaurant when storm warnings are in effect. Answer who, what, when, where, why, and how, and then prepare a one-page outline of your report. Make up any details you need.

14-39. **Planning Proposals** [LO-4] You're getting ready to launch a new lawn-care business that offers mowing, fertilizing, weeding, and other services. The lawn surrounding a nearby shopping center looks as if it could use better care, so you target that business for your first unsolicited proposal. To help prepare this proposal, write your answers to these questions:

- What questions will you need to answer before you can write a proposal to solve the reader's problem? Be as specific as possible.
- What customer benefits will you include in your proposal?
- Will you use a letter or memo format for your proposal? Explain your answer.

14-40. **Planning Proposals; Collaboration: Team Projects** [LO-4], **Chapter 2** Break into small groups and identify an operational problem occurring at your campus and involving one of the following: registration, university housing, food services, parking, or library services. Develop a workable solution to that problem. Finally, develop a list of pertinent facts that your team will need to gather to convince the reader that the problem exists and that your solution will work.

Expand Your Skills

Critique the Professionals

Download any of the free reports offered on the American Coatings Association website at **www.paint.org**. Identify the target audience(s) and purpose of the report you've chosen. Using whatever medium your instructor requests, write a brief analysis of the report, describing what works well and what doesn't work well.

Sharpening Your Career Skills Online

Find a website, video, article, podcast, or presentation that offers advice on writing effective business proposals. Write a brief email message to your instructor, describing the item you found and summarizing the career skills information you learned from it.

Build Your Career

As you explore job openings and research companies and professions in the coming months, keep a list of *keywords* that you run across. These are the terms that companies use to identify the types of talent they are searching for. It's important to know the right keywords for each job you plan to apply for because *applicant tracking systems* and other automated hiring tools often look for these terms in your résumé and other employment communication. See page 519 in Chapter 18 for more information on finding and using keywords.

Five-Minute Guide to Planning Reports and Proposals

Before you start a major report or proposal, review these helpful tips.

00:01

Figure out if you need to conduct research

1. Don't research without a plan; start with a problem statement that defines the purpose of your research.
2. Start with secondary research; the information you need might have already been collected by someone else.
   - Don't restrict your search to the obvious or easiest sources and methods.
   - Evaluate information and sources carefully; watch for biased, incomplete, or outdated information.
3. If secondary research can't provide what you need, conduct primary research.
   - Use a survey to collect large amounts of quantitative data and brief qualitative answers.
   - Use interviews to collect in-depth qualitative answers.

00:02

Plan ahead for how you will use the research

1. Will you need statistical software and expertise to evaluate numerical data?
2. Be careful not to confuse correlation for causation.
3. With textual, qualitative information, you have three choices:
   - Quote the material in full.
   - Paraphrase it to the same depth but in your own words.
   - Summarize it more briefly in your own words.

00:03

Tips for informational reports

1. Most informational reports use the direct approach; use the indirect approach if you need to prepare readers for unwelcome information.
2. Identify the organizational scheme that will make the information easiest for the audience to grasp, such as organizing subtopics by comparison, importance, sequence, spatial orientation, chronology, geography, or category.
3. If readers expect a particular format or breakdown of information, such as in a business plan, follow the general conventions for that type of report.

00:04

Tips for analytical reports

1. To help define the problem your analytical report will address, ask yourself what needs to be determined, why this issue is important, who is involved, where the problem is located, and how the situation originated.
2. Try problem factoring—dividing the problem into a series of logical, connected questions that try to identify cause and effect.
3. Keep in mind whether you are expected to deliver a conclusion only or a conclusion and a recommendation.
4. Focus on your conclusion or recommendation if you have credibility with readers and they are likely to accept your message.
5. Otherwise, focus on logical arguments, using the 2 + 2 = 4 or yardstick models.

00:05

Tips for proposals

1. Remember that unsolicited proposals are much more challenging; before you can propose a solution, you might first need to convince your readers that a problem or an opportunity exists.
2. If you are responding to an RFP, follow its requirements to the letter.

Endnotes

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15 Writing and Completing Reports and Proposals

LEARNING OBJECTIVES

After studying this chapter, you will be able to

1. Explain how to adapt to your audiences when writing reports and proposals.
2. Name five characteristics of effective report content, and list the topics commonly covered in the introduction, body, and close of formal reports.
3. List six strategies to strengthen a proposal argument, and identify the topics commonly covered in the introduction, body, and close of proposals.
4. Summarize the four tasks involved in completing business reports and proposals.
5. Identify the elements to include in a request for proposals (RFP).



Emma Kim/Cultura Creative (RF)/Alamy Stock Photo

To help readers navigate through a vast collection of reports and articles, the consulting firm McKinsey uses an interactive, reader-friendly report format it calls *Five Fifty* to offer two levels of information: a 5-minute summary and a 50-minute "deep dive."

COMMUNICATION CLOSE-UP AT
McKinsey & Company

www.mckinsey.com

Management consulting firms can be masters of content marketing, offering clients and potential clients access to original research, strategic insights, and tactical advice in every functional area of business management. Together with academic researchers, these firms practically function as the research and development department for the entire field of management.

The biggest and best of these firms generate a staggering amount of content. McKinsey & Company, perhaps the most prolific of them all, produces hundreds of articles every year and even publishes its own quarterly management journal. The firm started its own in-house "think tank," the McKinsey Global Institute, in 1992 and overall invests more than $600 million a year in original research.

All this adds up to a veritable library of value-added content. Naturally, the firm's research and publication efforts are intended to develop and promote its own capabilities as a service provider. However, the voluminous publication output has something to offer just about anyone who has an interest in business, including entrepreneurs, small-business owners, professionals, managers, top-level executives—and students.

In fact, it's almost too much of a good thing. With so much content, time-pressed readers might struggle to get oriented on new subjects and find in-depth coverage of specific topics of interest.

To help readers find their way, McKinsey now publishes a unique multilevel, digital report it calls the *McKinsey Quarterly Five Fifty*. Each week, subscribers get a mobile-friendly overview of a major business management topic that has been bullet-point summarized for a fast five-minute read, often with interactive visuals. Each major point then links to one or more in-depth articles that explore specific aspects of the subject (the 50-minute reads). Some editions also include links to blog posts, videos, and podcasts for a full multimedia experience.

Aside from its value to McKinsey readers, the Five Fifty format offers a great lesson in reader-friendly report writing. Great content is a requirement if you want to help readers, of course, but making that content easily accessible with thoughtful, reader-oriented design can make the difference between content that never finds an audience and content that makes an impact.[1]

Writing Reports and Proposals: Adapting to Your Audience

1 LEARNING OBJECTIVE
Explain how to adapt to your audiences when writing reports and proposals.

The communicators at McKinsey and Company (profiled in the chapter-opening Communication Close-Up) know that reports and proposals are most effective when they are adapted to the needs and interests of their intended audiences. To ensure your own success with reports, be sensitive to audience needs, build strong relationships with your audience, and control your style and tone.

BEING SENSITIVE TO YOUR AUDIENCE'S NEEDS

The "you" attitude is especially important with long or complex reports because they demand a lot from readers.

Chapter 5 discusses four aspects of audience sensitivity, and all four apply to reports and proposals: adopting the "you" attitude, maintaining a strong sense of etiquette, emphasizing the positive, and using bias-free language. Reports and proposals that are highly technical, complex, or lengthy can put heavy demands on readers, so the "you" attitude takes on special importance with these messages.

In addition, various audience members can have widely different information needs. For instance, if you're reporting on the results of a customer satisfaction survey, the service manager might want every detail, whereas the president might want only a top-level summary. With previews, summaries, appendixes, and other elements, you can meet the needs of a diverse audience.

BUILDING STRONG RELATIONSHIPS WITH YOUR AUDIENCE

Your reports may continue to be read for months or years after you write them—and reach audiences you never envisioned.

Building relationships with your readers starts with planning how to adapt your style and language to meet their needs and expectations. Bear in mind that some reports—particularly those that can be transmitted online—can take on lives of their own, reaching a wider audience than you ever imagined and being read years after you write them. Consequently, choose your content and language with care. Also, because many companies have specific guidelines for communicating with public audiences, make sure you're aware of these preferences before you start writing.

To establish or confirm your credibility in the audience's mind, research all sides of your topic and document your findings with reliable sources. Also, be aware that setting audience expectations too high can lead to problems with your credibility if you can't deliver everything people expect you to, so take particular care with the introductory sections of important reports.

CONTROLLING YOUR STYLE AND TONE

Adjust the level of formality to match the situation and your audience's expectations.

If you know your readers reasonably well and your report is likely to meet with their approval, you can adopt a fairly informal tone—provided that doing so is acceptable in the situation and in your company's culture. To make your tone less formal, refer to readers as *you* and refer to yourself as *I* (or *we*, if there are multiple report authors).

A more formal tone is usually appropriate for longer reports, especially those that deal with controversial or complex information. You'll also want to use a more formal tone when your report will be sent to other parts of the organization or to outsiders, such as customers, suppliers, or members of the community (see Figure 15.1).

If the situation calls for a more formal tone, use the impersonal journalism style, eliminating all references to *you* and *I* (including *we, us*, and *our*). When you use an impersonal style, you impose a controlled distance between you and your readers. Your tone is not only objective but also businesslike and unemotional. Be careful to avoid jokes, and minimize the use of similes, metaphors, and overly colorful language.

However, when crafting a more formal tone, take care not to go overboard, or you'll end up sounding stiff or dull. In addition, don't inadvertently slip into the passive voice. You can avoid this potential weakness by making the report content itself the actor in a sentence. For example, to convert "I think we should buy TramCo" to a more formal tone, you could write "The financial analysis clearly shows that buying TramCo is the best alternative."

MAKE YOUR REPORTS EASIER TO READ

Help today's time-pressed readers find what they're looking for and stay on track as they navigate through your documents. Today's readers often lack the time or the inclination to plow through long reports page by page or screen by screen. They typically want to browse quickly, find a section of interest, dive in for details, browse for another section, and so on. If you want readers to understand and accept your message, help them navigate your document by using headings and links, smooth transitions, and previews and reviews.

Help your audiences navigate through your reports by providing clear directions to key pieces of content.

FOOD FACTS

FDA U.S. FOOD & DRUG ADMINISTRATION

Raw Produce

Selecting and Serving it Safely



As you enjoy fresh produce, follow these safe handling tips to help protect yourself and your family.

Fruits and vegetables are an important part of a healthy diet. Your local markets carry a wide variety of nutritious fresh fruits and vegetables. However, harmful bacteria that may be in the soil or water where produce grows can come in contact with fruits and vegetables and contaminate them. Fresh produce may also become contaminated after it is harvested, such as during storage or preparation.

Eating contaminated produce can lead to foodborne illness, often called "food poisoning." So as you enjoy fresh produce, follow these safe handling tips to help protect yourself and your family.

Buy Right



You can help keep produce safe by making wise buying decisions.

- Choose produce that is not bruised or damaged.
- When buying pre-cut, bagged or packaged produce — such as half of a watermelon or bagged salad greens — choose only those items that are refrigerated or surrounded by ice.
- Bag fresh fruits and vegetables separately from raw meat, poultry, and seafood when packing them to take home from the market.

Store Properly



Proper storage of fresh produce can affect both quality and safety.

- Store perishable fresh fruits and vegetables (like strawberries, lettuce, herbs, and mushrooms) in a clean refrigerator at a temperature of 40° F or below. Use a refrigerator thermometer to check! If you're not sure whether an item should be refrigerated to keep its quality, ask your grocer.
- Refrigerate all produce that is purchased pre-cut or packaged.

Reports to Support Decisions

Judge the merits of past or future decisions (feasibility reports, justification reports)

February 2018 1

Raw Produce Selecting and Serving it Safely, U.S. Food & Drugs.

The heading and subheadings are clear and concise with no wordplay to slow readers down.

Paragraphs start with clear topic sentences.

The two-level subheadings offer a quick read to get the idea of what the section covers along with a more in-depth secondary heading.

This brief information is well suited to bullet-point formatting.

Generous use of white space and color makes the report inviting to read, which is the perfect visual tone for this consumer-oriented publication.

Figure 15.1 Audience-Friendly Reports
This page from a report on food safety demonstrates several aspects of audience-friendly writing and design.

Headings

Headings improve a document's readability and are especially useful for identifying the framework of a report. They also visually indicate shifts from one idea to the next and, when used in a combination of levels, help readers see the relationship between subordinate and main ideas. In addition, busy readers can quickly understand the gist of a document simply by scanning the headings. In online reports, headings serve all these functions, plus they can be used to provide links to other sections and other websites.

Many companies specify a format for headings, either through style guides or document templates. If yours does, use that recommended format. If you are creating your own scheme, make sure the hierarchy of headings and subheadings is clear. If you have three levels of headings in a report, for example, you might use 20-point bold type for the first-level headings, 16 points for the second level, and 12 points for the third level:

First Level
SECOND LEVEL
Third Level

Another option is to put the first-level headings in all capital letters or to emphasize them using color.

Transitions

Transitions connect ideas by helping readers move from one thought to the next.

Transitions help readers move from one section of a report to the next and from key point to key point within sections. Transitions can be words, sentences, or complete paragraphs. Here's an example:

> . . . As you can see, our profits have decreased by 12 percent over the past eight months. To counteract this decline in profits, we can explore alternatives. First, we can raise our selling prices. Second, we can work to reduce our manufacturing costs. Third, we can introduce new products that will support higher profit margins. However, each of these alternatives has both advantages and disadvantages.

The phrase *As you can see* alerts readers to the fact that they are reading a summary of the information just presented. The phrase *this decline in profits* refers to the previous paragraph, letting readers know that the text will be saying something else about that topic. The words *first, second*, and *third* help readers stay on track as the three alternatives are introduced, and the word *however* alerts readers to the fact that evaluating the three alternatives requires some additional discussion. Effective transitions such as these can help readers summarize and remember what they've learned so far while giving them a mental framework to process new information.

Previews and Reviews

Previews help readers prepare for upcoming information, and reviews help them verify and clarify what they've just read.

Preview sections introduce important topics by helping readers get ready for new information; they are particularly helpful when the information is complex, unexpected, or unfamiliar. Think of a preview as an opportunity for readers to arrange their mental file folders before you start giving them information to put in those folders.

Review sections come after a body of material and summarize the information just covered. They help readers absorb details while keeping track of the big picture. Long reports and those dealing with complex subjects can often benefit from multiple review sections, one at the end of every major subject block as well as a more comprehensive review at the very end of a document.

Previews and reviews can be written in sentence format, in bulleted lists, or using a combination of the two. Both are effective, but bullets can increase your document's

readability by adding white space to the document design. Consider the following preview, shown using both formats:

Sentence Format

The next section discusses the advantages of online advertising. Among them are currency, global reach, affordability, and interactivity.

Bulleted List

As the next section shows, online advertising has four advantages:

- Currency
- Global reach
- Affordability
- Interactivity

Drafting Report Content

2 LEARNING OBJECTIVE
Name five characteristics of effective report content, and list the topics commonly covered in the introduction, body, and close of formal reports.

With a clear picture of how you need to adapt to your audience, you're ready to begin composing your first draft. Before you put those first words down on paper, though, review your outline one last time. Verify that the organization you've chosen makes sense, given everything you've learned about your topic so far. Also, review the wording of the headings and subheadings to make sure they establish the right tone. For a hard-hitting, direct tone, use informative phrasing ("Quality Problems Result in Nearly 500 Customer Defections Every Year"). For an objective, indirect tone, use descriptive phrasing ("Effects of Product Quality on Customer Retention").

Before you start writing, review your outline one more time and verify the wording of your headings and subheadings.

Like other written business communications, reports and proposals have three main sections: an introduction (or *opening*), a body, and a close. The content and length of each section vary with the type and purpose of the document, the document's organizational structure, the length and depth of the material, the document's degree of formality, and your relationship with your audience.

At a minimum, an effective *introduction* accomplishes these four tasks:

- It helps the reader understand the context of the report by tying it to a problem or an assignment.
- It introduces the subject matter and indicates why it is important.
- It previews the main idea (if you're using the direct approach).
- It establishes the tone and the writer's relationship with the audience.

The introduction needs to put the report in context for the reader, introduce the subject, preview main ideas, and establish the tone of the document.

The *body* presents, analyzes, and interprets the information gathered during your investigation and supports your recommendations or conclusions. The length and content of the body can vary widely based on the subject matter.

The body of your report presents, analyzes, and interprets the information you gathered during your investigation.

The *close* has three important functions:

- It summarizes your key points.
- It emphasizes the benefits to the reader if the document suggests a change or some other course of action.
- It brings all the action items together in one place.

Your close is often the last opportunity to get your message across, so make it clear and compelling.

The final section of a report or proposal can leave a lasting impression, so use the close to make sure your report says what you intended.[2] In fact, readers who are in a hurry might skip the body of the report and read only the summary, so make sure it carries a strong, clear message.

The close might be the only part of your report some readers have time for, so it should convey the full weight of your message.

PROVIDE QUALITY CONTENT

Your credibility and prospects for the future are on the line with every business report you write, so make sure your content is

Effective report content is accurate, complete, balanced, clear, logical, and properly documented.

- **Accurate.** Information presented in a report must be factually correct. When writing reports, be sure to double-check your facts and references in addition to checking for typos. If an audience ever gets the inkling that your information is shaky, they'll start to view all your work with a skeptical eye.

- **Complete.** To help audiences make informed decisions, include all the information necessary for readers to understand the situation, problem, or proposal. Support all key assertions using an appropriate combination of illustrations, explanations, and facts.[3] Tell your readers what they need to know—no more, no less—and present the information in a way that is geared toward their needs. Mobile reporting apps can help you integrate text with "live" data that let readers explore if they need additional insights.
- **Balanced.** It's important to present all sides of the issue fairly and equitably and to include all the essential information, even if some of it doesn't support your line of reasoning. Omitting relevant information or facts can bias your report.
- **Clear and logical.** Save your readers time by making sure your sentences are uncluttered, contain well-chosen words, and proceed logically. To help your readers move from one point to the next, make your transitions clear and logical. For a successful report, identify the ideas that belong together and organize them in a way that's easy to understand.[4]
- **Documented properly.** If you use primary and secondary sources for your report or proposal, be sure to properly document and give credit to your sources, as Chapter 13 explains.

MAKE YOUR REPORTS EASIER TO WRITE

MOBILE APP
Redbooth's file and content management features help teams manage collaborative report writing.

Writing lengthy reports and proposals can be a huge task, so be sure to take advantage of technological tools to help you throughout the process. In addition to features such as automatic table of contents and index generators, look for opportunities to use *linked and embedded documents* to incorporate graphics, spreadsheets, databases, and other elements produced in other software programs. For instance, in Microsoft Office, you can choose to either *link* to another file (which ensures that changes in that file are reflected in your report) or *embed* another file (which doesn't include the automatic updating feature).

Also, be sure to explore your media and channel options. Video clips, animation, presentation slides, *screencasts* (recordings of on-screen activity), and other media elements can enhance the communication and persuasion powers of the written word.

Drafting Proposal Content

3 LEARNING OBJECTIVE
List six strategies to strengthen a proposal argument, and identify the topics commonly covered in the introduction, body, and close of proposals.

All the guidelines for writing reports apply to proposals as well, but these persuasive messages have some unique considerations. The most important factor is whether the proposal is solicited or unsolicited because that affects your organization, content, and tone.

If you're writing an unsolicited proposal, you have some latitude in the scope and organization of content, and you can design the entire proposal to put your idea or product in the best possible light. However, the scope and organization of a solicited proposal are usually governed by the request for proposals. Most RFPs spell out precisely what you should cover and in what order. This uniformity lets the recipient evaluate competing proposals in a systematic way.

DEFINE THE PROPOSAL'S PURPOSE

The AIDA model you learned in Chapter 12 works well for proposals, although you may need to adapt it if you're responding to an RFP.

The general purpose of any proposal is to persuade readers to do something, such as purchase goods or services, fund a project, or implement a program. As with any other persuasive message, you can use the AIDA model to gain attention, build interest, create desire, and motivate action (of course, you may need to adapt it if you're responding to an RFP or working within some other constraints). Here are some additional strategies to strengthen your persuasive argument:[5]

- **Demonstrate your knowledge.** Everything you write should show the reader that you have the knowledge and experience to solve the problem or address the opportunity outlined in your proposal.

- **Provide concrete information and examples.** Avoid vague, unsupported generalizations such as "We are losing money on this program." Instead, provide quantifiable details such as the amount of money being lost, how, why, and so on. Explain how much money your proposed solution will save. Spell out your plan and give details on how the job will be done.
- **Research the competition.** Find out what alternatives your audience might choose over your proposal so that you can emphasize why your solution is the optimum choice. Potential customers sometimes face a "buy or build" decision, in which they must choose between buying a solution from an external party and building it themselves. In these cases you are effectively competing against your target customers.
- **Prove that your proposal is workable.** Your proposal must be appropriate and feasible for your audience. It should be consistent with your audience's capabilities. For instance, your proposal would be pointless if it recommended a plan of action that requires three times the number of available employees or twice the available budget.
- **Adopt the "you" attitude.** Relate your product, service, or personnel to the reader's exact needs, either as stated in the RFP for a solicited proposal or as discovered through your own investigation for an unsolicited proposal.
- **Package your proposal attractively.** Make sure your proposal is letter perfect, inviting, and readable. Readers will prejudge the quality of your products or services by the proposal you submit. Errors, omissions, and inconsistencies will work against you—and may even cost you important career and business opportunities.

Business proposals need to provide more than just attractive ideas—readers look for evidence of practical, achievable solutions.

Proposals in various industries often have their own special challenges as well. For instance, management consultants must convince every potential client they have the skills and knowledge to solve the client's problem—without giving away the answer for free in the proposal. In other industries, such as transportation services, bidders may be asked to compute hundreds or thousands of individual pricing scenarios. Hands-on experience goes a long way when you're deciding what to include or exclude; whenever possible, get advice from a senior colleague who's been through it before.

SELECT THE ELEMENTS TO INCLUDE IN A PROPOSAL

As with reports, approach proposals by identifying the pieces to include in the introduction, body, and close. For short, letter-format proposals, the introduction can be as brief as a single paragraph (see Figure 15.2 on the next page), and then the proposal can move directly into the body to provide the details.

For solicited proposals, always follow the instructions in the RFP, but in general, the introduction presents and summarizes the problem you want to solve or the opportunity you want to pursue, along with your proposed solution. It orients readers to the remainder of the report. If your proposal is solicited, its introduction should refer to the RFP (or a clear description of the project) so that readers know which opportunity you're responding to. If your proposal is unsolicited, the introduction should mention any factors that led you to submit your proposal, such as prior conversations with the recipient or referrals from a third party.

The proposal's body gives complete details on the proposed solution and specifies the anticipated results. Because a proposal is a persuasive message, your audience expects you to promote your offering in a confident, professional manner. Even when you're expressing an idea you believe in passionately, be sure to maintain an objective tone so that you don't risk overselling your message.

Readers understand that a proposal is a persuasive message, so they're willing to accommodate a promotional style—if it is professional and focused on their needs.

The close of a proposal generally summarizes the key points, emphasizes the benefits readers will realize from your solution, summarizes the merits of your approach, restates why you and your firm are the ones to perform the service or provide the products in question, and asks for a decision from readers. The close is your last opportunity to persuade readers to accept your proposal. In both formal and informal proposals, make this section relatively brief, assertive (but not brash or abrupt), and confident.



O'Donnell & Associates, Inc.

1793 East Westerfield Road, Arlington Heights, Illinois 60005
(847) 398-1148 Fax: (847) 398-1149 Email: sales@dodbuilders.com

July 30, 2021

Ms. Joyce Colton, P.E.
AGI Builders, Inc.
1280 Spring Lake Drive
Belvidere, Illinois, 61008

Subject: Proposal No. F-0087 for AGI Builders, Elgin Manufacturing Campus

Dear Ms. Colton:

O'Donnell & Associates is pleased to submit the following proposal to provide construction testing services for the mass grading operations and utility work at the Elgin Manufacturing Campus, 126th St., Elgin, Illinois. Our company has been providing construction-testing services in the Chicago area since 1972 and has performed numerous large-scale geotechnical investigations across Illinois, including more than 100 at O'Hare International Airport, Midway Airport, Meig's Field, and other airports.

The opening paragraph serves as an introduction.

The introduction grabs the reader's attention by highlighting company qualifications.

Background

It is our understanding that the work consists of two projects: (1) the mass grading perations will require approximately six months, and (2) the utility work will require approximately three months. The two operations are scheduled as follows:

Mass Grading Operation	September 2021–February 2022
Utility Work	March 2022–May 2022

Headings divide the proposal into logical segments for easy reading.

The project background section acknowledges the two projects and their required timeline.

Proposed Approach and Work Plan

O'Donnell & Associates will perform observation and testing services during both the mass grading operations and the excavation and backfilling of the underground utilities. Specifically, we will perform field density tests on the compacted material using a nuclear moisture/density gauge, as required by the job specifications. We will also conduct appropriate laboratory tests such as ASTM D-1557 Modified Proctors. We will prepare detailed reports summarizing the results of our field and laboratory testing. Fill materials to be placed at the site may consist of natural granular materials (sand), processed materials (crushed stone, crushed concrete, slag), or clay soils. O'Donnell & Associates will provide qualified personnel to perform the necessary testing.

The work plan describes the scope of the project and outlines specific tests the company will perform.

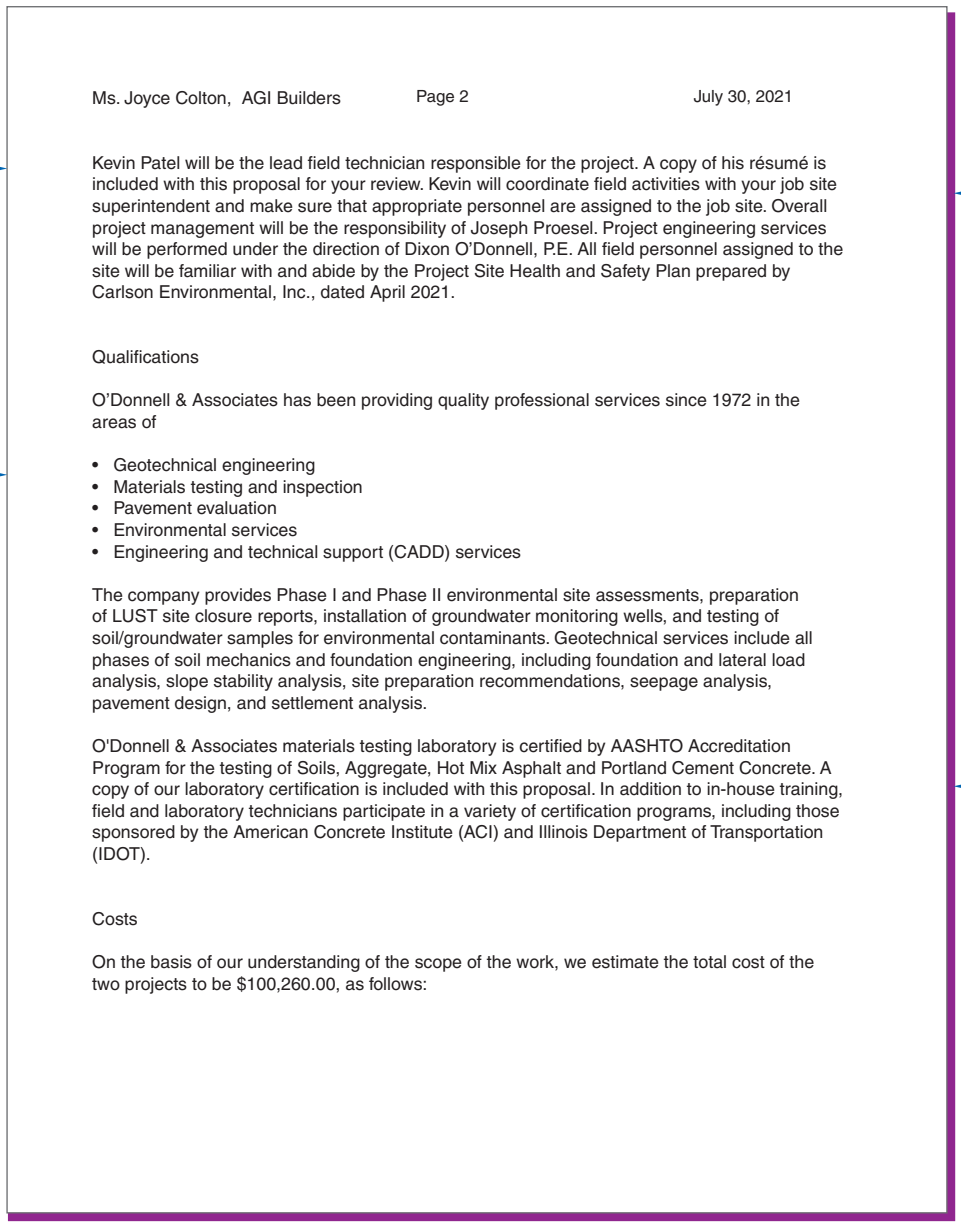
(continued)

Figure 15.2 External Solicited Proposal
This proposal was submitted by a geotechnical engineering firm that conducts a variety of environmental testing services. The company is bidding on the mass grading and utility work specified by the prospective client, AGI Builders.

See Table 15.1 on page 434 for a summary of the content to consider including in reports and proposals. You can use this table as a handy reference whenever you need to write a report in school or on the job.

Consider using proposal-writing software if you and your company need to submit proposals as a routine part of doing business. These programs can automatically personalize proposals, ensure proper structure (making sure you don't forget any sections, for instance), organize storage of all your boilerplate text, integrate contact information from sales databases, scan RFPs to identify questions (and even assign them to content experts), and fill in preliminary answers to common questions from a centralized knowledge base.[6]

MOBILE APP
For report writing on the go, **LogMeIn** lets you access your computer's programs and files from your mobile device.



Ms. Joyce Colton, AGI Builders Page 2 July 30, 2021

Kevin Patel will be the lead field technician responsible for the project. A copy of his résumé is included with this proposal for your review. Kevin will coordinate field activities with your job site superintendent and make sure that appropriate personnel are assigned to the job site. Overall project management will be the responsibility of Joseph Proesel. Project engineering services will be performed under the direction of Dixon O'Donnell, P.E. All field personnel assigned to the site will be familiar with and abide by the Project Site Health and Safety Plan prepared by Carlson Environmental, Inc., dated April 2021.

Qualifications

O'Donnell & Associates has been providing quality professional services since 1972 in the areas of

- Geotechnical engineering
- Materials testing and inspection
- Pavement evaluation
- Environmental services
- Engineering and technical support (CADD) services

The company provides Phase I and Phase II environmental site assessments, preparation of LUST site closure reports, installation of groundwater monitoring wells, and testing of soil/groundwater samples for environmental contaminants. Geotechnical services include all phases of soil mechanics and foundation engineering, including foundation and lateral load analysis, slope stability analysis, site preparation recommendations, seepage analysis, pavement design, and settlement analysis.

O'Donnell & Associates materials testing laboratory is certified by AASHTO Accreditation Program for the testing of Soils, Aggregate, Hot Mix Asphalt and Portland Cement Concrete. A copy of our laboratory certification is included with this proposal. In addition to in-house training, field and laboratory technicians participate in a variety of certification programs, including those sponsored by the American Concrete Institute (ACI) and Illinois Department of Transportation (IDOT).

Costs

On the basis of our understanding of the scope of the work, we estimate the total cost of the two projects to be $100,260.00, as follows:

The work plan also explains who will be responsible for the various tasks.

The qualifications section grabs attention by mentioning compelling qualifications.

The project leader's résumé is attached to the proposal, providing additional detail without cluttering up the body of the proposal.

Describing *certifications* (approvals by recognized industry associations or government agencies) helps build the company's credibility.

(continued)

Figure 15.2 External Solicited Proposal (*Continued*)

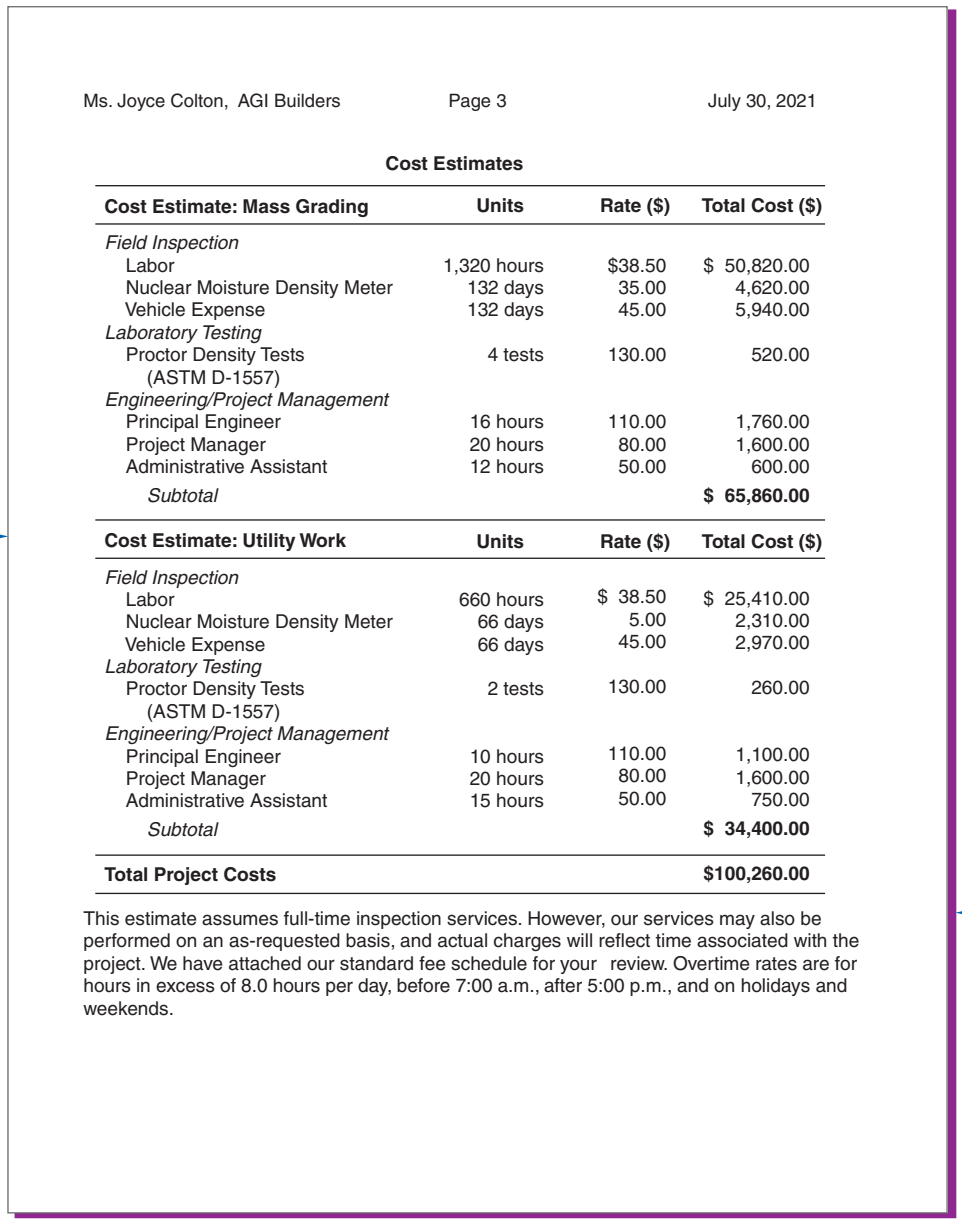
Completing Reports and Proposals

4 LEARNING OBJECTIVE
Summarize the four tasks involved in completing business reports and proposals.

As with shorter messages, when you have finished your first draft, you need to perform four tasks to complete your document: revise, produce, proofread, and distribute. The revision process is essentially the same for reports as for other business messages, although it may take considerably longer, depending on the length and complexity of your documents. Evaluate your organization, style, and tone, making sure your content is clear, logical, and reader oriented. Then work to improve the report's readability by varying sentence length, keeping paragraphs short, using lists and bullets, and adding headings and subheadings. Remember that even minor mistakes can affect your credibility.

Tight, efficient writing is especially important with online content.

Tight, efficient writing that is easy to skim is always a plus, but it's especially important for impatient online audiences.[7] Review online content carefully; strip out all information that doesn't meet audience needs and condense everything else as much as possible. Audiences will gladly return to sites that deliver quality information quickly—and they'll avoid sites that don't.



Ms. Joyce Colton, AGI Builders Page 3 July 30, 2021

Cost Estimates

Cost Estimate: Mass Grading	Units	Rate ($)	Total Cost ($)
Field Inspection			
Labor	1,320 hours	$38.50	$ 50,820.00
Nuclear Moisture Density Meter	132 days	35.00	4,620.00
Vehicle Expense	132 days	45.00	5,940.00
Laboratory Testing			
Proctor Density Tests (ASTM D-1557)	4 tests	130.00	520.00
Engineering/Project Management			
Principal Engineer	16 hours	110.00	1,760.00
Project Manager	20 hours	80.00	1,600.00
Administrative Assistant	12 hours	50.00	600.00
Subtotal			**$ 65,860.00**

Cost Estimate: Utility Work	Units	Rate ($)	Total Cost ($)
Field Inspection			
Labor	660 hours	$ 38.50	$ 25,410.00
Nuclear Moisture Density Meter	66 days	5.00	2,310.00
Vehicle Expense	66 days	45.00	2,970.00
Laboratory Testing			
Proctor Density Tests (ASTM D-1557)	2 tests	130.00	260.00
Engineering/Project Management			
Principal Engineer	10 hours	110.00	1,100.00
Project Manager	20 hours	80.00	1,600.00
Administrative Assistant	15 hours	50.00	750.00
Subtotal			**$ 34,400.00**
Total Project Costs			**$100,260.00**

This estimate assumes full-time inspection services. However, our services may also be performed on an as-requested basis, and actual charges will reflect time associated with the project. We have attached our standard fee schedule for your review. Overtime rates are for hours in excess of 8.0 hours per day, before 7:00 a.m., after 5:00 p.m., and on holidays and weekends.

A clear and complete itemization of estimated costs builds confidence in the dependability of the project's financial projections.

To give the client some budgetary flexibility, the proposal offers an alternative to the fixed-fee approach—which may lower any resistance to accepting the bid.

(continued)

Figure 15.2 **External Solicited Proposal (*Continued*)**

After assembling your report or proposal in its final form, review it thoroughly one last time, looking for inconsistencies, errors, and missing components. Don't forget to proof your visuals thoroughly and make sure they are positioned correctly. For online reports, make sure all links work as expected and all necessary files are active and available. If you need specific tips on proofreading documents, look back at Chapter 6.

PRODUCING FORMAL REPORTS AND PROPOSALS

The number and variety of parts you include in a report depend on the type of report, audience requirements, organizational expectations, and report length.

Formal reports and proposals can include a variety of features beyond the text and visuals (see Table 15.2 on page 435). Most of these elements provide additional information; a few are more decorative and add a degree of formality.

A *synopsis* is a brief overview of a report's key points; an *executive summary* is a fully developed "mini" version of the report.

One of the most important elements to consider is an introductory feature that helps time-pressed readers get a sense of what's in the document or even get all the key points without reading the full document. A **synopsis**—sometimes called an **abstract**—is a brief overview (one page or less) of a report's most important points.



Ms. Joyce Colton, AGI Builders Page 4 July 30, 2021

Authorization

With a staff of over 30 personnel, including registered professional engineers, resident engineers, geologists, construction inspectors, laboratory technicians, and drillers, we are confident that O'Donnell & Associates is capable of providing the services required for a project of this magnitude.

If you would like our firm to provide the services as outlined in this proposal, please sign this letter and return it to us along with a certified check in the amount of $10,000 (our retainer) by August 13, 2021. Please call me if you have any questions regarding the terms of this proposal or our approach.

Sincerely,

Dixon O'Donnell

Dixon O'Donnell
Vice President

Enclosures

Accepted for AGI BUILDERS, INC.

By_____ Date _____

The brief close emphasizes the bidder's qualifications and asks for a decision.

The call to action clarifies the steps needed to put the project in motion.

The customer's signature will make the proposal a binding contract.

Figure 15.2 External Solicited Proposal (*Continued*)

The phrasing of a synopsis can be *informative* (presenting the main points in the order in which they appear in the text) if you're using the direct approach or *descriptive* (simply describing what the report is about without "giving away the ending") if you're using the indirect approach. As an alternative to a synopsis or an abstract, a longer report may include an **executive summary**—a fully developed "mini" version of the report, for readers who lack the time or motivation to read the entire document.

Following the body of the report, possible supplemental parts (those coming after the main text of the report or proposal) include one or more **appendixes**, a **bibliography**, and an **index**. In general, place here supporting materials that could be of interest to some or all your readers but that aren't crucial to the main thrust of your message.

For an illustration of how the various parts fit together in a report, see "Report Writer's Notebook: Analyzing a Formal Report," starting on page 438.

TABLE 15.1 Content Elements to Consider for Reports and Proposals

Reports	Proposals
Introduction: Establish the context, identify the subject, preview main ideas (if using the direct approach), and establish tone and reader relationship.	**Introduction:** Identify the problem you intend to solve or the opportunity you want to pursue.
• **Authorization.** Reiterate who authorized the report, if applicable. • **Problem/purpose.** Explain the reason for the report's existence and what the report will achieve. • **Scope.** Describe what will and won't be covered in the report. • **Background.** Review historical conditions or factors that led up to the report. • **Sources and methods.** Discuss the primary and secondary sources consulted and research methods used. • **Definitions.** List terms and their definitions, including any terms that might be misinterpreted. Terms may also be defined in the body, explanatory notes, or glossary. • **Limitations.** Discuss factors beyond your control that affect report quality (but do not use this as an excuse for poor research or a poorly written report). • **Report organization.** Identify the topics to be covered and in what order.	• **Background or statement of the problem.** Briefly review the situation at hand, establish a need for action, and explain how things could be better. In unsolicited proposals, convince readers that a problem or an opportunity exists. • **Solution.** Briefly describe the change you propose, highlighting your key selling points and their benefits to show how your proposal will solve the reader's problem. • **Scope.** State the boundaries of the proposal—what you will and will not do. • **Proposal organization.** Orient the reader to the remainder of the proposal and call attention to the major divisions of thought.
Body: Present relevant information, and support your recommendations or conclusions.	**Body:** Give complete details on the proposed solution, and describe anticipated results.
• **Explanations.** Give complete details of the problem, project, or idea. • **Facts, statistical evidence, and trends.** Lay out the results of studies or investigations. • **Analysis of action.** Discuss potential courses of action. • **Pros and cons.** Explain the advantages, disadvantages, costs, and benefits of a course of action. • **Procedures.** Outline steps for a process. • **Methods and approaches.** Discuss how you've studied a problem (or gathered evidence) and arrived at your solution (or collected your data). • **Criteria.** Describe the benchmarks for evaluating options and alternatives. • **Conclusions and recommendations.** Discuss what you believe the evidence reveals and what you propose should be done about it. • **Support.** Give the reasons behind your conclusions or recommendations.	• **Facts and evidence to support your conclusions.** Provide information that will help readers take the action you would like them to take. • **Proposed approach.** Describe your concept, product, or service. Stress reader benefits and emphasize any advantages you have over your competitors. • **Work plan.** Describe how you'll accomplish what must be done (unless you're providing a standard, off-the-shelf item). Explain the steps you'll take, their timing, the methods or resources you'll use, and the person(s) responsible. State when work will begin, how it will be divided into stages, when you'll finish, and whether follow-up will be needed. • **Statement of qualifications.** Describe your organization's experience, personnel, and facilities—relating it all to readers' needs. Include a list of client references. • **Costs.** Prove that your costs are realistic—break them down so that readers can see the costs of labor, materials, transportation, travel, training, and other categories.
Close: Summarize key points, emphasize the benefits of any recommendations, and list action items; label as "Summary" or "Conclusions and Recommendations."	**Close:** Summarize key points, emphasize the benefits and advantages of your proposed solution, and ask for a decision from the reader.
• **For direct approach.** Summarize key points (except in short reports), listing them in the order in which they appear in the body. Briefly restate your conclusions or recommendations, if appropriate. • **For indirect approach.** If you haven't done so at the end of the body, present your conclusions or recommendations. • **For motivating action.** Spell out exactly what should happen next and provide a schedule with specific task assignments.	• **Review of argument.** Briefly summarize the key points. • **Review of reader benefits.** Briefly summarize how your proposal will help the reader. • **Review of the merits of your approach.** Briefly summarize why your approach will be more effective than alternatives. • **Restatement of qualifications.** For external proposals, briefly reemphasize why you and your firm should do the work. • **Request.** Ask for a decision from the reader.

In contrast to formal reports, synopses and executive summaries are less common in proposals. In an unsolicited proposal, the letter of transmittal should catch the reader's interest. In a solicited proposal, the introduction provides an adequate preview of the contents. Moreover, proposals often take the indirect approach, which means they build up to the call to action at the end of the report, and summarizing this information at the beginning could undermine the carefully structured persuasive build-up.

TABLE 15.2 Production Elements to Consider for Formal Reports and Proposals

Reports	Proposals
Prefatory elements (before the introduction) • **Cover.** A concise title that gives readers the information they need to grasp the purpose and scope of the report. For a formal printed report, choose heavy, high-quality *cover stock*. • **Title fly.** Some formal reports open with a plain sheet of paper that has only the title of the report on it, although this is certainly not necessary. • **Title page.** Typically includes the report title, name(s) and title(s) of the writer(s), and date of submission; this information can be put on the cover instead. • **Letter/memo of authorization.** If you received written authorization to prepare the report, you may want to include that letter or memo in your report. • **Letter/memo of transmittal.** Cover letter that introduces the report and can include scope, methods, limitations, and highlights of the report; offers to provide follow-up information or assistance; and acknowledges help received while preparing the report. • **Table of contents.** List all section headings and major subheadings to show the location and hierarchy of the information in the report. • **List of illustrations.** Consider including if the illustrations are particularly important, and you want to call attention to them. • **Synopsis or executive summary.** See discussion on page 432.	**Prefatory elements** (before the introduction) • **Cover, title fly, title page.** Same uses as with reports; be sure to follow any instructions in the RFP, if relevant. • **Copy of or reference to the RFP.** Instead of having a letter of authorization, a solicited proposal should follow the instructions in the RFP. Some will instruct you to include the entire RFP in your proposal; others may want you to simply identify it by a name and tracking number. • **Synopsis or executive summary.** These components are less common in formal proposals than in reports. In an unsolicited proposal, your letter of transmittal will catch the reader's interest. In a solicited proposal, the introduction will provide an adequate preview of the contents. • **Letter/memo of transmittal.** If the proposal is solicited, treat the transmittal letter as a positive message, highlighting those aspects of your proposal that may give you a competitive advantage. If the proposal is unsolicited, the transmittal letter should follow the advice for persuasive messages (see Chapter 12)—the letter must persuade the reader that you have something worthwhile to offer that justifies reading the proposal.
Supplementary elements (after the close) • **Appendixes.** Additional information related to the report but not included in the main text because it is too lengthy or lacks direct relevance. List appendixes in your table of contents and refer to them as appropriate in the text. • **Bibliography.** List the secondary sources you consulted; see Appendix B. • **Index.** List names, places, and subjects mentioned in the report, along with the pages on which they occur.	**Supplementary elements** (after the close) • **Appendixes.** Same uses as with reports; be sure to follow any instructions in the RFP, if relevant. • **Résumés of key players.** For external proposals, résumés can convince readers that you have the talent to achieve the proposal's objectives.

DISTRIBUTING REPORTS AND PROPOSALS

For physical distribution of important printed reports or proposals, consider spending the extra money for a professional courier or package delivery service. Doing so can help you stand out in a crowd, and it lets you verify receipt. Alternatively, if you've prepared the document for a single person or small group in your office or the local area, delivering it in person will give you the chance to personally "introduce" the report and remind readers why they're receiving it.

For digital distribution, ask your readers what format they would like to receive the report in. The two most common formats are Microsoft Word documents and PDF files, but depending on the circumstances a different format might be more useful. With PDF files, you can select a variety of security settings that restrict who can open, edit, or print the document.[8]

Many businesses use the Adobe portable document format (PDF) to distribute reports electronically.

If your company or client expects you to distribute your reports via a web-based content management system, a shared workspace, or some other online location, double-check that you've uploaded the correct file(s) to the correct location. Verify the on-screen display of your reports after you've posted them, making sure graphics, charts, links, and other elements are in place and operational.

MOBILE APP

Dropbox lets you store files in the cloud and access or share them from PCs and mobile devices.

For a reminder of the tasks involved in producing formal reports and proposals, see "Checklist: Producing Formal Reports and Proposals."

CHECKLIST Producing Formal Reports and Proposals

A. Prefatory parts

- Use your company's standard report covers, if available.
- Include a concise, descriptive title on the cover.
- Include a title fly only if you want an extra-formal touch.
- On the title page, list (1) the report title; (2) the name, title, and address of the group or person who authorized the report; (3) the name, title, and address of the group or person who prepared the report; and (4) the date of submission.
- Include a copy of the letter of authorization, if appropriate.
- If responding to an RFP, follow its instructions for including a copy or referring to the RFP by name or tracking number.
- Include a letter of transmittal that introduces the report.
- Provide a table of contents in outline form, with headings worded exactly as they appear in the body of the report.
- Include a list of illustrations if the report contains many them.
- Include a synopsis (brief summary of the report) or an executive summary (a condensed, "mini" version of the report) for longer reports.

B. Body of the report

- Draft an introduction that prepares the reader for the content that follows.
- Provide information that supports your conclusions, recommendations, or proposals in the body of the report.
- Don't overload the body with unnecessary detail.
- Close with a summary of your main idea.

C. Supplementary parts

- Use appendixes to provide supplementary information or supporting evidence.
- List in a bibliography any secondary sources you used.
- Provide an index if your report contains many terms or ideas and is likely to be consulted over time.

Writing Requests for Proposals

5 LEARNING OBJECTIVE
Identify the elements to include in a request for proposals (RFP).

When writing an RFP, be sure to give potential respondents all the information they need to craft a meaningful response to your request.

At some point in your career, you might be in a position to solicit proposals, and learning how to request effective proposals will simplify the process considerably. When writing an RFP, remember that it is more than just a request; it's an informational report that provides potential bidders with the information they need to craft effective proposals. Writing an RFP demands careful consideration because it starts a process that leads to a proposal, a contract, and eventually the delivery of a product or the performance of a service. In other words, mistakes at the RFP stage can ripple throughout the process and create costly headaches for everyone involved.

An RFP's specific content will vary widely from industry to industry, but all RFPs should include some combination of the following elements:[9]

- **Company background.** Give potential bidders some background information on your organization, your business priorities, and other information they might need to respond in an informed manner.
- **Project description.** Put your requirements in context; are you seeking bids for routine supplies or services, or do you need a major new system?
- **Requirements.** The requirements section should spell out everything you expect from potential vendors; don't leave anything to unstated assumptions. Will potential vendors provide key equipment or will you? Will you expect vendors to work under confidentiality restrictions, such as a nondisclosure agreement? Who will pay if costs run higher than expected? Will you require ongoing service or support? Providing this information can be a lot of work, but again, overlooking anything at this point is likely to create considerable problems once the project gets rolling.
- **Decision criteria.** Let bidders know how you'll be making the decision. Is quality more important than cost? Will you consider only certain types of vendors or only those that use certain processes or technologies? Will you entertain bids from companies that have never worked in your industry? The answers to such questions not only help bidders determine whether they're right for your project but also help them craft proposals that meet your needs.

- **Proposal requirements.** Explain exactly what you expect to see in the proposal itself—which sections, what media, how many copies, and so on.
- **Submission and contact information.** A well-written RFP answers most potential questions, and it also tells people when, where, and how to respond. In addition, effective RFPs always give bidders the name of a contact within the organization who can answer detailed questions.

A smart approach to managing RFPs can minimize the work involved for everyone and maximize the effectiveness of the RFP. First, identify your decision criteria and then brainstorm the information you need to measure against those criteria. Don't ask bidders to submit information about every aspect of their operations if such details aren't relevant to your decision. Making such unreasonable demands is unfair to bidders, will unnecessarily complicate your review process, and will discourage some potentially attractive bidders from responding.

Second, to get quality responses that match your unique business needs, give bidders plenty of time to respond. Successful companies are usually busy responding to other RFPs and working on other projects; you can't expect them to drop everything to focus solely on your RFP.

Third, if your company generates numerous RFPs, tracking proposals can become a full-time job. Consider establishing an online system for tracking responses automatically.[10]

REPORT WRITER'S NOTEBOOK

Analyzing a Formal Report

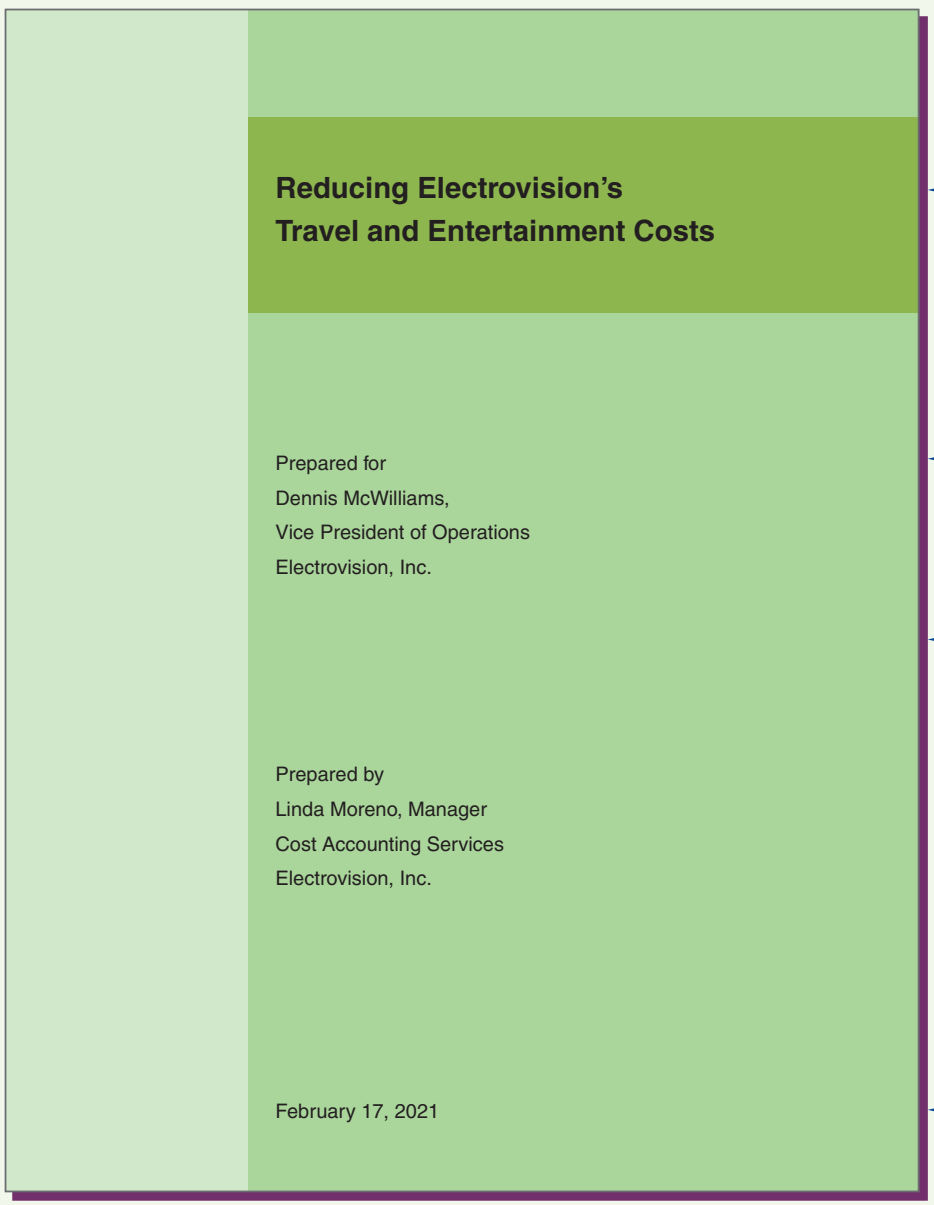
The report presented in the following pages was prepared by Linda Moreno, the cost accounting manager at Electrovision. Electrovision's main product is optical character recognition equipment, which is used by the U.S. Postal Service for sorting mail. Moreno's job is to help analyze the company's costs, and she has this to say about the background of the report:

> For the past three or four years, Electrovision has been on a roll. Our A-12 optical character reader was a real breakthrough, and the post office grabbed up as many as we could make. Our sales and profits kept climbing, and morale was fantastic. Everybody seemed to think that the good times would last forever. Unfortunately, everybody was wrong. When the Postal Service announced that it was postponing all new equipment purchases because of cuts in its budget, we woke up to the fact that we are essentially a one-product company with one customer. At that point, management started scrambling around looking for ways to cut costs until we could diversify our business.
>
> Vice president of operations Dennis McWilliams asked me to help identify cost-cutting opportunities in travel and entertainment. On the basis of his personal observations, he felt that Electrovision was overly generous in its travel policies and that we might be able to save a significant amount by controlling these costs more carefully. My investigation confirmed his suspicion.
>
> I was reasonably confident that my report would be well received. I've worked with Dennis for several years and know what he likes: plenty of facts, clearly stated conclusions, and specific recommendations for what should be done next. I also knew that my report would be passed on to other Electrovision executives, so I wanted to create a good impression. I wanted the report to be accurate and thorough, visually appealing, readable, and appropriate in tone.

When writing the analytical report that follows, Moreno based the organization on conclusions and recommendations presented in direct order. The first two sections of the report correspond to Moreno's two main conclusions: that Electrovision's travel and entertainment costs are too high and that cuts are essential. The third section presents recommendations for achieving better control over travel and entertainment expenses. As you review the report, analyze both the mechanical aspects and the way Moreno presents her ideas. Be prepared to discuss the way the various components convey and reinforce the main message.



Rawpixel.com/Shutterstock



Large, bold type distinguishes the title from the other elements on the cover.

The name of the recipient, if applicable, typically comes after the title.

Generous use of white space between elements gives the cover an open feel.

Dating the report gives it a feeling of currency when it is submitted and, conversely, as time passes, signals to future readers that the material might be out of date at that point.

The "how-to" tone of Moreno's title is appropriate for an action-oriented report that emphasizes recommendations. A more neutral title, such as "An Analysis of Electrovision's Travel and Entertainment Costs," would be more suitable for an informational report.

The memo format is appropriate for this internal report; the letter format would be used for transmitting an external report.

The tone is conversational yet still businesslike and respectful.

Acknowledging help given by others is good etiquette and a way to foster positive working relationships.

MEMORANDUM

TO: Dennis McWilliams, Vice President of Operations
FROM: Linda Moreno, Manager of Cost Accounting Services LM
DATE: February 17, 2021
SUBJECT: Reducing Electrovision's Travel and Entertainment Costs

Here is the report you requested January 28 on Electrovision's travel and entertainment costs.

Your suspicions were right. We are spending far too much on business travel. Our unwritten policy has been "anything goes," leaving us with no real control over T&E expenses. Although this hands-off approach may have been understandable when Electrovision's profits were high, we can no longer afford the luxury of going first class.

The solutions to the problem seem rather clear. We need to have someone with centralized responsibility for travel and entertainment costs, a clear statement of policy, an effective control system, and a business-oriented travel service that can optimize our travel arrangements. We should also investigate alternatives to travel, such as videoconferencing.

Getting people to economize is not going to be easy. In the course of researching this issue, I've found that our employees are deeply attached to their generous travel privileges. I think some would almost prefer a cut in pay to a loss in travel status. We'll need a lot of top management involvement to sell people on the need for moderation.

I'm grateful to Mary Lehman and Connie McIlvain for their considerable help in rounding up and sorting through five years' worth of expense reports.

Thanks for giving me the opportunity to work on this assignment. It's been a real education. If you have any questions about the report, please give me a call.

Moreno expects a positive response, so she presents her main conclusion right away.

She closes graciously, with thanks and an offer to discuss the results.

In this report, Moreno decided to write a brief memo of transmittal and include a separate executive summary. Short reports (fewer than 10 pages) often combine the synopsis or executive summary with the memo or letter of transmittal.

The table of contents doesn't include any elements that appear before the "Contents" page.

The headings are worded exactly as they appear in the text.

Moreno lists the figures because they are all significant, and the list is fairly short.

This and other prefatory pages are numbered with Roman numerals.

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The Impact of Reforms 8

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The table lists only the page number on which a section begins, not the entire range of numbers.

LIST OF ILLUSTRATIONS

FIGURES PAGE

1. Airfares and Lodging Account for Over Two-Thirds of Electrovision's T&E Budget 2

2. T&E Expenses Continue to Increase as a Percentage of Sales 2

3. Electrovision Employees Spend Over Twice as Much as the Average Business Traveler 3

TABLE

1. Electrovision Can Trim Travel and Entertainment Costs by an Estimated $6 Million per Year 8

Moreno included only first- and second-level headings in her table of contents, even though the report contains third-level headings. She prefers a shorter table of contents that focuses attention on the main divisions of thought. She used informative titles, which are appropriate for a report to a receptive audience.

The executive summary begins by stating the purpose of the report.

Moreno presents the points in the executive summary in the same order as they appear in the report, using subheadings that summarize the content of the main sections of the report.

EXECUTIVE SUMMARY

This report analyzes Electrovision's travel and entertainment (T&E) costs and presents recommendations for reducing those costs.

Travel and Entertainment Costs Are Too High

Travel and entertainment is a large and growing expense category for Electrovision. The company spends over $16 million per year on business travel, and these costs have been increasing by 12 percent annually. Company employees make roughly 3,390 trips each year at an average cost per trip of $4,720. Airfares are the biggest expense, followed by hotels, meals, and rental cars.

The nature of Electrovision's business does require extensive travel, but the company's costs are excessive: Our employees spend more than twice the national average on travel and entertainment. Although the location of the company's facilities may partly explain this discrepancy, the main reason for our high costs is a management style that gives employees little incentive to economize.

Cuts Are Essential

Electrovision management now recognizes the need to gain more control over this element of costs. The company is currently entering a period of declining profits, prompting management to look for every opportunity to reduce spending. At the same time, rising airfares and hotel rates are making T&E expenses more significant.

Electrovision Can Save $6 Million per Year

Fortunately, Electrovision has a number of excellent opportunities for reducing T&E costs. Savings of up to $6 million per year should be achievable, judging by the experience of other companies. A sensible travel-management program can save companies as much as 35 percent a year (Gilligan 39–40), and we should be able to save even more, since we purchase many more business-class tickets than the average. Four steps will help us cut costs:

1. Hire a director of travel and entertainment to assume overall responsibility for T&E spending, policies, and technologies, including the hiring and management of a national travel agency.
2. Educate employees on the need for cost containment, both in avoiding unnecessary travel and reducing costs when travel is necessary.
3. Negotiate preferential rates with travel providers.
4. Implement technological alternatives to travel, such as virtual meetings.

As necessary as these changes are, they will likely hurt morale, at least in the short term. Management will need to make a determined effort to explain the rationale for reduced spending. By exercising moderation in their own travel arrangements, Electrovision executives can set a good example and help other employees accept the changes. On the plus side, using travel alternatives such as web conferencing will reduce the travel burden on many employees and help them balance their business and personal lives.

iv

The page numbering in the executive summary continues with Roman numerals.

← Her audience is receptive, so the tone in the executive summary is forceful; a more neutral approach would be better for hostile or skeptical readers.

← The executive summary uses the same font and paragraph treatment as the text of the report.

Moreno decided to include an executive summary because her report is aimed at a mixed audience, some of whom are interested in the details of her report and others who just want the "big picture." The executive summary is aimed at the second group, giving them enough information to make a decision without burdening them with the task of reading the entire report.

Her writing style matches the serious nature of the content without sounding distant or stiff. Moreno chose the formal approach because several members of her audience are considerably higher up in the organization, and she did not want to sound too familiar. In addition, her company prefers the impersonal style for formal reports.

A color bar highlights the report title and the first-level headings; a variety of other design treatments are possible as well.

REDUCING ELECTROVISION'S TRAVEL AND ENTERTAINMENT COSTS

INTRODUCTION

Electrovision has always encouraged a significant amount of business travel. To compensate employees for the stress and inconvenience of frequent trips, management has authorized generous travel and entertainment (T&E) allowances. This philosophy has been good for morale, but last year Electrovision spent $16 million on travel and entertainment—$7 million more than it spent on research and development.

This year's T&E costs will affect profits even more because of increases in airline fares and hotel rates. Also, the company anticipates that profits will be relatively weak for a variety of other reasons. Therefore, Dennis McWilliams, Vice President of Operations, has asked the accounting department to explore ways to reduce the T&E budget.

The purpose of this report is to analyze T&E expenses, evaluate the effect of recent hotel and airfare increases, and suggest ways to tighten control over T&E costs. The report outlines several steps that could reduce Electrovision's expenses, but the precise financial impact of these measures is difficult to project. The estimates presented here provide a "best guess" of what Electrovision can expect to save.

In preparing this report, the accounting department analyzed internal expense reports for the past five years to determine how much Electrovision spends on travel and entertainment. These figures were then compared with average statistics compiled by Dow Jones (publisher of the *Wall Street Journal*) and presented as the Dow Jones Travel Index. We also analyzed trends and suggestions published in a variety of business journal articles to see how other companies are coping with the high cost of business travel.

THE HIGH COST OF TRAVEL AND ENTERTAINMENT

Although many companies view travel and entertainment as an incidental cost of doing business, the dollars add up. At Electrovision the bill for airfares, hotels, rental cars, meals, and entertainment totaled $16 million last year. Our T&E budget has increased by 12 percent per year for the past five years. Compared with the average U.S. business traveler, Electrovision's expenditures are high, largely because of management's generous policy on travel benefits.

A *running footer* that contains the report title and the page number appears on every page.

The introduction opens by establishing the need for action.

Moreno mentions her sources and methods to increase credibility and to give readers a complete picture of the study's background.

In her brief introduction, Moreno counts on topic sentences and transitions to indicate that she is discussing the purpose, scope, and limitations of the study.

$16 Million per Year Spent on Travel and Entertainment

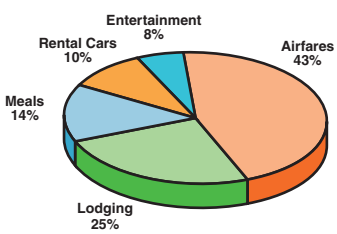
Electrovision's annual budget for T&E is only 8 percent of sales. Because this is a relatively small expense category compared with such things as salaries and commissions, it is tempting to dismiss T&E costs as insignificant. However, T&E is Electrovision's third-largest controllable expense, directly behind salaries and information systems.

Last year Electrovision personnel made about 3,390 trips at an average cost per trip of $4,720. The typical trip involved a round-trip flight of 3,000 miles, meals, hotel accommodations for two or three days, and a rental car. Roughly 80 percent of trips were made by 20 percent of the staff—top management and sales personnel traveled most, averaging 18 trips per year.

Figure 1 illustrates how the T&E budget is spent. The largest categories are airfares and lodging, which together account for $7 of every $10 that employees spend on T&E. This spending breakdown has been relatively steady for the past five years and is consistent with the distribution of expenses experienced by other companies.

The visual is placed as close as possible to the point it illustrates.

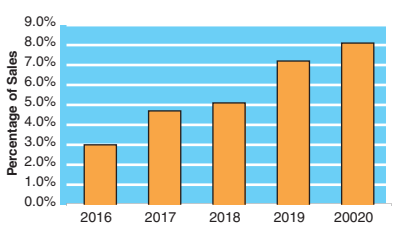
Figure 1
Airfares and Lodging Account for Over Two-Thirds of Electrovision's T&E Budget



Although the composition of the T&E budget has been consistent, its size has not. As mentioned earlier, these expenditures have increased by about 12 percent per year for the past five years, roughly twice the rate of the company's sales growth (see Figure 2). This rate of growth makes T&E Electrovision's fastest-growing expense item.

Each visual has a title that clearly indicates what it's about; titles are consistently placed to the left of each visual.

Figure 2
T&E Expenses Continue to Increase as a Percentage of Sales



Moreno opens the first main section of the body with a topic sentence that introduces an important fact about the subject of the section. Then she orients the reader to the three major points developed in the section.

Electrovision's Travel Expenses Exceed National Averages

Much of our travel budget is justified. Two major factors contribute to Electrovision's high T&E budget:

- With our headquarters on the West Coast and our major customer on the East Coast, we naturally spend a lot of money on cross-country flights.
- A great deal of travel takes place between our headquarters here on the West Coast and the manufacturing operations in Detroit, Boston, and Dallas. Corporate managers and division personnel make frequent trips to coordinate these disparate operations.

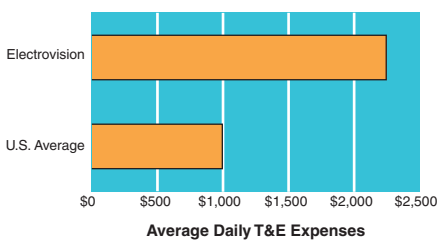
However, even though a good portion of Electrovision's travel budget is justifiable, the company spends considerably more on T&E than the average business traveler (see Figure 3).

Moreno introduces visuals before they appear and indicates what readers should notice about the data.

The visuals are numbered consecutively and referred to by their numbers in the text.

Figure 3
Electrovision Employees Spend Over Twice as Much as the Average Business Traveler

Source: *Wall Street Journal* and company records



The Dow Jones Travel Index calculates the average cost per day of business travel in the United States based on average airfare, hotel rates, and rental car rates. The average fluctuates weekly as travel companies change their rates, but it has been running at about $1,000 per day for the last year or so. In contrast, Electrovision's average daily expense over the past year has been $2,250—a hefty 125 percent higher than average. This figure is based on the average trip cost of $4,720 listed earlier and an average trip length of 2.1 days.

Spending Has Been Encouraged

Although a variety of factors may contribute to this differential, Electrovision's relatively high T&E costs are at least partially attributable to the company's philosophy and management style. Since many employees do not enjoy business travel, management has tried to make the trips more pleasant by authorizing business-class airfare, luxury hotel accommodations, and full-size rental cars. The sales staff is encouraged to entertain clients at top restaurants and to invite them to cultural and sporting events.

The chart in Figure 3 is simple but effective; Moreno includes just enough data to make her point. Notice how she is as careful about the appearance of her report as she is about the quality of its content.

A bulleted list makes it easy for readers to identify and distinguish related points.

The cost of these privileges is easy to overlook, given the weakness of Electrovision's system for tracking T&E expenses:

- The monthly financial records do not contain a separate category for travel and entertainment; the information is buried under Cost of Goods Sold or under Selling, General, and Administrative Expenses.
- Each department head is given authority to approve any expense report, regardless of how large it may be.
- Receipts are not required for expenditures less than $100.
- Individuals are allowed to make their own travel arrangements.
- No one is charged with the responsibility for controlling the company's total spending on travel and entertainment.

GROWING IMPACT ON THE BOTTOM LINE

Informative headings focus reader attention on the main points. Such headings are appropriate when a report uses the direct approach and is intended for a receptive audience. However, descriptive headings are more effective when a report uses the indirect approach and readers are less receptive.

During the past three years, the company's healthy profits have resulted in relatively little pressure to push for tighter controls over all aspects of the business. However, as we all know, the situation is changing. We're projecting flat to declining profits for the next two years, a situation that has prompted all of us to search for ways to cut costs. At the same time, rising airfares and hotel rates have increased the impact of T&E expenses on the company's financial results.

Lower Profits Underscore the Need for Change

The next two years promise to be difficult for Electrovision. After several years of steady increases in spending, the Postal Service is tightening procurement policies for automated mail-handling equipment. Funding for the A-12 optical character reader has been canceled. As a consequence, the marketing department expects sales to drop by 15 percent. Although Electrovision is negotiating several other promising R&D contracts, the marketing department does not foresee any major procurements for the next two to three years.

At the same time, Electrovision is facing cost increases on several fronts. As we have known for several months, the new production facility now under construction in Salt Lake City, Utah, is behind schedule and over budget. Labor contracts in Boston and Dallas will expire within the next six months, and plant managers there anticipate that significant salary and benefits concessions may be necessary to avoid strikes.

Moreover, marketing and advertising costs are expected to increase as we attempt to strengthen these activities to better cope with competitive pressures. Given the expected decline in revenues and increase in costs, the Executive Committee's prediction that profits will fall by 12 percent in the coming fiscal year does not seem overly pessimistic.

Moreno designed her report to include plenty of white space so even those pages that lack visuals are still attractive and easy to read.

Airfares and Hotel Rates Are Rising

Business travelers have grown accustomed to frequent fare wars and discounting in the travel industry in recent years. Excess capacity and aggressive price competition, particularly in the airline business, made travel a relative bargain.

Moreno supports her argument with objective facts and sound reasoning.

However, that situation has changed as weaker competitors have been forced out and the remaining players have grown stronger and smarter. Airlines and hotels are better at managing inventory and keeping occupancy rates high, which translates into higher costs for Electrovision. Last year saw some of the steepest rate hikes in years. Business airfares (tickets most likely to be purchased by business travelers) jumped more than 40 percent in many markets. The trend is expected to continue, with rates increasing another 5 to 10 percent overall (Phillips 331; "Travel Costs Under Pressure" 30; Dahl B6).

Given the fact that air and hotel costs account for almost 70 percent of our T&E budget, the trend toward higher prices in these two categories will have serious consequences, unless management takes action to control these costs.

METHODS FOR REDUCING T&E COSTS

The recommendations are realistic, noting both the benefits and the risks of taking action.

By implementing a number of reforms, management can expect to reduce Electrovision's T&E budget by as much as 40 percent. This estimate is based on the general assessment made by American Express (Gilligan 39) and on the fact that we have an opportunity to significantly reduce air travel costs by eliminating business-class travel. However, these measures are likely to be unpopular with employees. To gain acceptance for such changes, management will need to sell employees on the need for moderation in T&E allowances.

Four Ways to Trim Expenses

By researching what other companies are doing to curb T&E expenses, the accounting department has identified four prominent opportunities that should enable Electrovision to save about $6 million annually in travel-related costs.

Institute Tighter Spending Controls

A single individual should be appointed director of travel and entertainment to spearhead the effort to gain control of the T&E budget. More than a third of all U.S. companies now employ travel managers ("Businesses Use Savvy Managers" 4). The director should be familiar with the travel industry and should be well versed in both accounting and information technology. The director should also report to the vice president of operations. The director's first priorities should be to establish a written T&E policy and a cost-control system.

Electrovision currently has no written policy on T&E, a step that is widely recommended by air travel experts (Smith D4). Creating a policy would clarify management's position and serve as a vehicle for communicating the need for moderation.

Moreno creates a forceful tone by using action verbs in the third-level subheadings of this section. This approach is appropriate to the nature of the study and the attitude of the audience. However, in a status-conscious organization, the imperative verbs might sound a bit too presumptuous coming from a junior member of the staff.

In addition to making key points easy to find, bulleted lists help break up the text to relieve the reader's eye.

At a minimum, the policy should include the following:

- All T&E should be strictly related to business and should be approved in advance.
- Except under special circumstances to be approved on a case-by-case basis, employees should travel by coach and stay in mid-range business hotels.
- The T&E policy should apply equally to employees at all levels.

To implement the new policy, Electrovision will need to create a system for controlling T&E expenses. Each department should prepare an annual T&E budget as part of its operating plan. These budgets should be presented in detail so that management can evaluate how T&E dollars will be spent and can recommend appropriate cuts. To help management monitor performance relative to these budgets, the director of travel should prepare monthly financial statements showing actual T&E expenditures by department.

The director of travel should also be responsible for retaining a business-oriented travel service that will schedule all employee business trips and look for the best travel deals, particularly in airfares. In addition to centralizing Electrovision's reservation and ticketing activities, the agency will negotiate reduced group rates with hotels and rental car firms. The agency selected should have offices nationwide so that all Electrovision facilities can channel their reservations through the same company. This is particularly important in light of the dizzying array of often wildly different airfares available between some cities. It's not uncommon to find dozens of fares along commonly traveled routes (Rowe 30). In addition, the director can help coordinate travel across the company to secure group discounts whenever possible (Barker 31; Miller B6).

Moreno lists the steps needed to implement her recommendations.

Reduce Unnecessary Travel and Entertainment

One of the easiest ways to reduce expenses is to reduce the amount of traveling and entertaining that occurs. An analysis of last year's expenditures suggests that as much as 30 percent of Electrovision's T&E is discretionary. The professional staff spent $2.8 million attending seminars and conferences last year. Although these gatherings are undoubtedly beneficial, the company could save money by sending fewer representives to each function and perhaps by eliminating some of the less valuable seminars.

Similarly, Electrovision could economize on trips between headquarters and divisions by reducing the frequency of such visits and by sending fewer people on each trip. Although there is often no substitute for face-to-face meetings, management could try to resolve more internal issues through telephone, electronic, and written communication.

Electrovision can also reduce spending by urging employees to economize. Instead of flying business class, employees can fly coach class or take advantage of discount fares. Rather than ordering a $50 bottle of wine, employees can select a less expensive bottle or dispense with alcohol entirely. People can book rooms at moderately priced hotels and drive smaller rental cars.

Moreno takes care not to overstep the boundaries of her analysis. For instance, she doesn't analyze the value of the seminars that employees attend every year, so she avoids any absolute statements about reducing travel to seminars.

Obtain Lowest Rates from Travel Providers

Apart from urging employees to economize, Electrovision can also save money by searching for the lowest available airfares, hotel rates, and rental car fees. Currently, few employees have the time or knowledge to seek out travel bargains. When they need to travel, they make the most convenient and comfortable arrangements. A professional travel service will be able to obtain lower rates from travel providers.

Judging by the experience of other companies, Electrovision may be able to trim as much as 30 to 40 percent from the travel budget simply by looking for bargains in airfares and negotiating group rates with hotels and rental car companies. Electrovision should be able to achieve these economies by analyzing its travel patterns, identifying frequently visited locations, and selecting a few hotels that are willing to reduce rates in exchange for guaranteed business. At the same time, the company should be able to save up to 40 percent on rental car charges by negotiating a corporate rate.

The possibilities for economizing are promising; however, making the best travel arrangements often requires trade-offs such as the following:

By pointing out possible difficulties and showing that she has considered all angles, Moreno builds reader confidence in her judgment.

- The best fares might not always be the lowest. Indirect flights are usually cheaper, but they take longer and may end up costing more in lost work time.
- The cheapest tickets often require booking 14 or even 30 days in advance, which is often impossible for us.
- Discount tickets are usually nonrefundable, which is a serious drawback when a trip needs to be canceled at the last minute.

Replace Travel with Technological Alternatives

Online meeting systems such as WebEx and GoTo Meeting offer a compelling alternative to many instances of business travel. With webcam video, application/screen sharing, and collaboration tools such as virtual whiteboards, they have made great strides toward replicating the in-person meeting experience.

As effective as these systems can be, though, they shouldn't automatically replace every in-person meeting. When establishing a business relationship, for example, meeting face to face is an important part of building trust and getting past the uncertainties of working with a new partner. Part of the new travel director's job would be to draft guidelines for choosing travel or online meeting options.

Note how Moreno makes the transition from section to section. The first sentence under the second heading on this page refers to the subject of the previous paragraph and signals a shift in thought.

An informative title in the table is consistent with the way headings are handled throughout this report, and it is appropriate for a report to a receptive audience.

The Impact of Reforms

By implementing tighter controls, reducing unnecessary expenses, negotiating more favorable rates, and exploring alternatives to travel, Electrovision should be able to reduce its T&E budget significantly. As Table 1 illustrates, the combined savings should be in the neighborhood of $6 million, although the precise figures are somewhat difficult to project.

The in-text reference to the table highlights the key point the reader should get from the table.

Table 1
Electrovision Can Trim Travel and Entertainment Costs by an Estimated $6 Million per Year

SOURCE OF SAVINGS	ESTIMATED SAVINGS
Switching from business-class to coach airfare	$2,300,000
Negotiating preferred hotel rates	940,000
Negotiating preferred rental car rates	460,000
Systematically searching for lower airfares	375,000
Reducing interdivisional travel	675,000
Reducing seminar and conference attendance	1,250,000
TOTAL POTENTIAL SAVINGS	**$6,000,000**

Including financial estimates helps management envision the impact of the suggestions, even though the estimated savings are difficult to project accurately.

To achieve the economies outlined in the table, Electrovision will incur expenses for hiring a director of travel and for implementing a T&E cost-control system. These costs are projected at $115,000: $105,000 per year in salary and benefits for the new employee and a one-time expense of $10,000 for the cost-control system. The cost of retaining a full-service travel agency is negligible, even with the service fees that many are now passing along from airlines and other service providers.

The measures required to achieve these savings are likely to be unpopular with employees. Electrovision personnel are accustomed to generous T&E allowances, and they are likely to resent having these privileges curtailed. To alleviate their disappointment:

- Management should make a determined effort to explain why the changes are necessary.
- The director of corporate communication should be asked to develop a multifaceted campaign that will communicate the importance of curtailing T&E costs.
- Management should set a positive example by adhering strictly to the new policies.
- The limitations should apply equally to employees at all levels in the organization.

Note how Moreno calls attention in the first paragraph to items in the table, without repeating the information in the table.

She uses a descriptive heading for the last section of the text. In informational reports, this section is often called "Summary"; in analytical reports, it is called "Conclusions" or "Conclusions and Recommendations."

CONCLUSIONS AND RECOMMENDATIONS

Electrovision is currently spending $16 million per year on T&E. Although much of this spending is justified, the company's costs are high relative to competitors' costs, mainly because Electrovision has been generous with its travel benefits.

Electrovision's liberal approach to T&E was understandable during years of high profitability; however, the company is facing the prospect of declining profits for the next several years. Management is therefore motivated to cut costs in all areas of the business. Reducing T&E spending is particularly important because the bottom-line impact of these costs will increase as airline fares increase.

Electrovision should be able to reduce T&E costs by as much as 40 percent by taking four important steps:

1. *Institute tighter spending controls.* Management should hire a director of travel and entertainment who will assume overall responsibility for T&E activities. Within the next six months, this director should develop a written travel policy, institute a T&E budget and a cost-control system, and retain a professional, business-oriented travel agency that will optimize arrangements with travel providers.

2. *Reduce unnecessary travel and entertainment.* Electrovision should encourage employees to economize on T&E spending. Management can accomplish this by authorizing fewer trips and by urging employees to be more conservative in their spending.

3. *Obtain lowest rates from travel providers.* Electrovision should focus on obtaining the best rates on airline tickets, hotel rooms, and rental cars. By channeling all arrangements through a professional travel agency, the company can optimize its choices and gain clout in negotiating preferred rates.

4. *Replace some travel with technological alternatives.* Online meeting systems should be adequate for most of our tactical meetings with established clients and for most internal communication as well.

Because these measures may be unpopular with employees, management should make a concerted effort to explain the importance of reducing travel costs. The director of corporate communication should be given responsibility for developing a plan to communicate the need for employee cooperation.

Presenting the recommendations in a list gives each one emphasis.

Moreno summarizes her conclusions in the first two paragraphs—a good approach because she organized her report around conclusions and recommendations, so readers have already been introduced to them.

Moreno doesn't introduce any new facts in this section. In a longer report she might have divided this section into subsections, labeled "Conclusions" and "Recommendations," to distinguish between the two.

MLA style lists references alphabetically by the author's last name, and when the author is unknown, by the title of the reference. (See Appendix B for additional details on preparing reference lists.)

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Moreno's list of references follows the style recommended in the *MLA Handbook*. The box below shows how these sources would be cited following American Psychological Association (APA) style.

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COMMUNICATION CHALLENGES AT McKinsey & Company

You landed your dream job as a digital content producer for McKinsey. This role includes writing, editing, and producing a wide variety of articles and reports. Study these scenarios and decide how to respond, based on what you learned in this chapter.

INDIVIDUAL CHALLENGE: Article and report content can display a range of writing tones, from informal and casual to formal and distant. You encounter the following section in a report you are editing, and for this particular publication, you need to revise it create a more formal tone.

> You want my best advice? As you move forward, keep your eyes and ears open to innovations that could affect your career and your company. Carefully consider the predictions you hear, but trust me—don't swallow any of them hook, line, and sinker. Before you make any major career decisions, ask yourself what would have to happen for those predictions to come true.

TEAM CHALLENGE: With a team assigned by your instructor, locate the latest Five Fifty features on the McKinsey website (**www.mckinsey.com/quarterly/the-five-fifty**) and select one that interests the team. Explore the feature and its embedded links, with an eye toward answering the following questions:

- Can you easily follow the flow of ideas from the big picture down to detailed discussions? If not, how would you improve the feature?
- Is the use of interactivity and graphics effective?
- Does the feature work well on mobile devices? If not, what problems did you encounter?
- What impression do you have of McKinsey's expertise in this subject area after using the Five Fifty feature?

Summarize your findings in a brief report.

Key Terms

abstract Name usually given to a synopsis that accompanies long technical, professional, or academic reports

appendix Supplementary section that contains materials related to the report but not included in the text because they are too long or perhaps not relevant to everyone in the audience

bibliography List of the secondary sources consulted in the preparation of a report

executive summary A brief but complete version of the report; may contain headings, well-developed transitions, and even visual elements

index An alphabetical list of names and subjects mentioned in a report, along with the pages on which they occur

Summary of Learning Objectives

1 Explain how to adapt to your audiences when writing reports and proposals. Adapt to your audience by demonstrating sensitivity to their needs (adopting the "you" attitude, maintaining a strong sense of etiquette, emphasizing the positive, and using bias-free language), building a strong relationship with your audience (making sure your writing reflects the desired image of your organization and building your credibility), and controlling your style and tone to achieve the appropriate degree of formality for the situation.

Effective reports help readers navigate the document by using three elements: (1) headings (and links for online reports), which set off important ideas and provide the reader with clues as to the report's framework and shifts in discussion; (2) transitions, which tie together ideas and keep readers moving along; and (3) previews and reviews, which prepare readers for new information and summarize previously discussed information.

2 Name five characteristics of effective report content, and list the topics commonly covered in the introduction, body, and close of formal reports. Effective report content is accurate if it is factually correct and error free. It is complete if it includes all necessary information and supports all key assertions. It is balanced if it presents all sides of an argument. It is clear and logical if it is well written and organized logically. It is properly documented if credit is given to all primary and secondary sources of information used.

The introduction highlights the person(s) who authorized the report, the purpose and scope of the report, necessary background material, the sources or methods used to gather information, important definitions, any limitations, and the order in which the various topics are covered. The body can discuss such details as problems, opportunities, facts, evidence, trends, results of studies or investigations, analysis of potential courses of action and their advantages and disadvantages, process procedures and steps, methods and approaches, evaluation criteria for options, conclusions, recommendations, and supporting reasons. The close summarizes key points, restates conclusions and recommendations, if appropriate, and lists action items.

3 List six strategies to strengthen a proposal argument, and identify the topics commonly covered in the introduction, body, and close of formal reports. To strengthen your argument, you should demonstrate your knowledge, provide concrete examples, research the competition, prove that your proposal is workable, adopt a "you" attitude, and make your proposal attractive and error free.

The most common elements in the introduction of a proposal are background information or a statement of the problem or opportunity, an overview of the proposed solution, a delineation of the scope of the proposal, and a description of how the proposal is organized. The body can contain a full description of the proposed solution, a work plan with schedules and other key implementation information, a statement

of the firm's qualifications, and a breakdown of project costs. The close usually contains a summary of key points, a brief reminder of the benefits readers will realize from the solution and the merits of the proposed approach, a quick summary of qualifications, and a call to action in terms of a request for a decision.

4 Summarize the four tasks involved in completing business reports and proposals. The four completion tasks of revising, producing, proofreading, and distributing all need to be accomplished with care, given the size and complexity of many reports. The production stage for a formal report or proposal can involve creating elements not found in most other business documents. Possible prefatory parts (those coming before the main text of the report or proposal) include a cover, a title fly, a title page, a letter of authorization, a letter of transmittal, a table of contents, a list of illustrations, and a synopsis (a brief overview of the report) or an executive summary (a miniature version of the report). Possible supplemental parts (those coming after the main text of the report or proposal) include one or more appendixes, a bibliography, and an index.

5 Identify the elements to include in a request for proposals (RFP). The content of RFPs varies widely from industry to industry and project to project, but most include background on the company, a description of the project, solution requirements, the criteria that will be used to make selection decisions, expectations for submitted proposals, and any relevant submission and contact information.

Test Your Knowledge

To review chapter content related to each question, refer to the indicated Learning Objective.

15-1. What writing choices can you make to adjust the formality of your reports? [LO-1]

15-2. What navigational elements can you use to help readers follow the structure and flow of information in a long report? [LO-1]

15-3. Why is the close of a report or proposal so important? [LO-2]

15-4. What are three supplementary parts often included in formal reports? [LO-2]

15-5. Why must the introduction of an unsolicited proposal include a statement of the problem or opportunity that the proposal addresses? [LO-3]

15-6. Why is the work plan a key component of a proposal? [LO-3]

15-7. How should you refer to the RFP in a solicited proposal? [LO-3]

15-8. What is the equivalent of a letter of authorization for a proposal? [LO-4]

15-9. How does a synopsis differ from an executive summary? [LO-4]

15-10. Why does writing an RFP require such careful thought? [LO-5]

Apply Your Knowledge

To review chapter content related to each question, refer to the indicated Learning Objective.

15-11. How would you report on a confidential survey in which employees rated their managers' capabilities? Both employees and managers expect to see the results. Would you give the same report to employees and managers? What components would you include or exclude for each audience? Explain your choices. [LO-1]

15-12. What are the risks of not explaining the purpose of a proposal within the introduction? [LO-3]

15-13. If a company receives a solicited formal proposal outlining the solution to a particular problem, is it ethical for the company to adopt the proposal's recommendations without hiring the firm that submitted the proposal? Why or why not? [LO-3]

15-14. Is an executive summary a persuasive message? Explain your answer. [LO-4]

Practice Your Skills

Exercises

Each activity is labeled according to the primary skill or skills you will need to use. To review relevant chapter content, you can refer to the indicated Learning Objective. In some instances, supporting information will be found in another chapter, as indicated.

15-15. Message Strategies: Informational Reports [LO-1] Imagine that you and a classmate are helping Linda Moreno prepare her report on Electrovision's travel and entertainment costs (see the Report Writer's Notebook on pages 438–452). This time, however, the report is to be informational rather than analytical, so it will not include recommendations. Review the existing report and determine what changes would be needed to make it an informational report. Be as specific as possible. For example, if your team decides the report needs a new title, what title would you use? Draft a transmittal memo for Moreno to use in conveying this informational report to Dennis McWilliams.

15-16. Message Strategies: Informational Reports [LO-1] Review a long article in a business magazine (print or online). Highlight examples of how the article uses headings, links (if online), transitions, previews, and reviews to help readers navigate through the content.

15-17. Message Strategies: Analytical Reports; Communication Ethics: Resolving Ethical Dilemmas [LO-1], Chapter 1 Your boss has asked you to prepare a feasibility report to determine whether the company should advertise its custom-crafted cabinetry in the weekly neighborhood newspaper. Based on your primary research, you think it should. As you draft the introduction to your report, however, you discover that the survey administered to the neighborhood newspaper subscribers was flawed. Several of the questions were poorly written and misleading. You used the survey results, among other findings, to justify your recommendation. The report is due in three days. What

actions might you want to take, if any, before you complete your report?

15-18. Completing: Producing Formal Reports [LO-4] You are president of the Friends of the Library, a not-for-profit group that raises funds and provides volunteers to support your local library. Every February you send a report of the previous year's activities and accomplishments to the County Arts Council, which provides an annual grant of $1,000 toward your group's summer reading festival. Now it's February 6, and you've completed your formal report. Here are the highlights:

- Back-to-school book sale raised $2,000
- Holiday craft fair raised $1,100
- Promotion and prizes for summer reading festival cost $1,450
- Materials for children's program featuring a local author cost $125
- New reference databases for library's career center cost $850
- Bookmarks promoting library's website cost $200

Write a letter of transmittal to Erica Maki, the council's director. Because she is expecting this report, you can use the direct approach. Be sure to express gratitude for the council's ongoing financial support.

15-19. Distributing Reports; Communication Ethics: Resolving Ethical Dilemmas [LO-4], Chapter 1 You submitted what you thought was a masterful report to your boss more than three weeks ago. The report analyzes current department productivity and recommends several steps you think will improve employee output without increasing individual workloads. Brilliant, you thought. But you haven't heard a word from your boss. Did you overstep your boundaries by making recommendations that might imply that she has not been doing a good job? Did you overwhelm her with your ideas? You'd like some feedback. In your last email to her, you asked whether she had read your report. So far you've received no reply.

Then yesterday, you overheard the company vice president talk about some productivity changes in your department—the same changes you recommended in your report. Now you're worried that your boss submitted your report to senior management and will take full credit for your terrific ideas. What, if anything, should you do? Should you confront your boss about this? Should you ask to meet with the company vice president? Discuss this situation with your teammates and develop a solution to this sticky situation. Present your solution to the class, explaining the rationale behind your decision.

15-20. Revising for Clarity and Conciseness [LO-4] The following sentence appears in your first draft of a report that analyzes perceived shortcomings in your company's employee health benefits:

> Among the many criticisms and concerns expressed by the workforce, at least among the 376 who responded to our online survey (out of 655 active employees), the issues of elder care, health insurance during retirement, and the increased amount that employees are being forced to pay every month as the company's contribution to health insurance coverage has declined over the past two years were identified as the most important.

Revise this 69-word sentence to make it shorter, more direct, and more powerful.

Expand Your Skills

Critique the Professionals

Browse the websites of several companies to find a downloadable PDF file of a report, white paper, company backgrounder, product overview, or other document at least two pages long. Evaluate the design and production quality of this document. Does the layout enhance the message or distract your attention from it? It what ways do design elements convey the company's brand image? Does the document strike you as "underdesigned" or "overdesigned" for its intended purpose? Using whatever medium your instructor requests, write a brief summary of your analysis. Be sure to include a link to the document.

Sharpening Your Career Skills Online

Find a website, video, article, podcast, or presentation that offers advice on creating effective business reports. Write a brief email message to your instructor or a post for your class blog, describing the item that you found and summarizing the career skills information you learned from it.

Build Your Career

Résumé formats vary widely, but all résumés should include a brief *introductory statement* that comes immediately after your name and contact information. The goal of this section is to let readers know within a matter of seconds how you can potentially contribute to an employer. As Chapter 18 points out, you have three choices for this element. A *career objective* is the traditional choice, but it is used less nowadays because it is less informative than the other choices.

A *qualifications summary* (sometimes labeled a *summary of qualifications*) offers a concise summary of your most important qualifications as they relate to an employer's needs. This is a good choice if you don't have a long employment history (and your education is still your strongest selling point) or if you have a dominant theme to your qualifications and you want to pursue opportunities where that theme would be compelling to potential employers. If you completed your *public profile* from Chapter 6's Build Your Career activity and the *headline* from Chapter 7, you have the material you need for an effective qualifications summary.

If you are further along in your career and intend to stay on the same career track, a *career summary* is probably the best choice. This option is particularly good if you have a record of increasing levels of responsibility and performance because it can suggest that you're ready for the next challenge.

As you start to pull your résumé package together, consider which introductory statement will work best for you. Sketch out ideas and revisit your personal brand/professional promise if needed to come up with a clear, concise, and compelling statement.

Cases

For all cases, feel free to use your creativity to make up any details you need to craft effective messages.

Short Reports

REPORT-WRITING SKILLS

15-21. Message Strategies: Informational Reports [LO-1] The video game industry recently found itself in a real-life "battle royale" when Epic Games released the free-to-play *Battle Royale* version of its already-popular *Fortnite* game. Within weeks, millions of players were joining 100-person mega-battles—so many that the surge affected sales of other video games.[11]

Your task: Research the impact that *Fortnite Battle Royale* had on other companies in the video game industry. Summarize your findings in a one-page report.

REPORT-WRITING SKILLS

15-22. Message Strategies: Informational Reports [LO-1] Concern is growing in many youth sports about the negative consequences of existing approaches to player development and competition. The long-term athlete development (LTAD) approach aims to instill methods and mindsets that will make athlete development more successful in the long run while making sports more enjoyable for kids. The American Development Model (ADM) used by USA Hockey is one example of the LTAD approach in a specific sport.

Your task: Visit USA Hockey's ADM website at **www.admkids.com**. Read the material on the Athlete Development page, then write a brief informational report (one to two pages) on the ADM concept, including the rationale behind it and the benefits it offers youth athletes.

REPORT-WRITING SKILLS/PORTFOLIO BUILDER

15-23. Message Strategies: Analytical Reports [LO-1] Redecorating and remodeling to meet one's specific needs and tastes are among the great joys of owning a home. Many people are content with superficial changes, such as new paint or new accessories, but some are more ambitious. These homeowners want to move walls, add rooms, redesign kitchens, convert garages to home theaters—the big stuff.

With many consumer trends, publishers try to create magazines that appeal to carefully identified groups of potential readers and the advertisers who'd like to reach them. As the editorial director for *Better Homes & Gardens*, you know the do-it-yourself (DIY) market is already served by numerous magazines (including your own company's *Do It Yourself* magazine), but you see an opportunity in those homeowners who tackle big, ambitious projects. Case Tables 15.1 through 15.3 summarize the results of some preliminary research you asked your company's research staff to conduct.

Your task: You think the data show a real opportunity for a "big projects" DIY magazine, although you'll need more extensive research to confirm the size of the market and refine the editorial direction of the magazine. Prepare a brief analytical report that presents the data you have, identifies the opportunity or opportunities you've found (suggest your own ideas, based on the data in the tables), and requests funding from the editorial board to pursue further research.

CASE TABLE 15.1 Rooms Most Frequently Remodeled by DIYers

Room	Homeowners Surveyed Who Have Tackled or Plan to Tackle at Least a Partial Remodel (%)
Kitchen	60
Bathroom	48
Home office/study	44
Bedroom	38
Media room/home theater	31
Den/recreation room	28
Living room	27
Dining room	12
Sunroom/solarium	8

CASE TABLE 15.2 Average Amount Spent on Remodeling Projects

Estimated Amount ($)	Surveyed Homeowners (%)
< 5,000	5
5,000–9,999	21
10,000–19,999	39
20,000–49,999	22
> 50,000	13

CASE TABLE 15.3 Tasks Performed by Homeowner on a Typical Remodeling Project

TASK	Surveyed Homeowners Who Perform or Plan to Perform Most or All of This Task Themselves (%)
Conceptual design	90
Technical design/architecture	34
Demolition	98
Foundation work	62
Framing	88
Plumbing	91
Electrical	55
Heating/cooling	22
Finish carpentry	85
Tile work	90
Painting	95
Interior design	52

REPORT-WRITING SKILLS

15-24. Message Strategies: Informational Reports [LO-1] Anyone contemplating stock market investing is likely to shudder at least a little bit at the market's penchant for taking a tumble now and again.

Your task: Write a brief informational report that contains a chart of one of the major stock market indexes (such as the Dow Jones Industrial Average or the S&P 500) over the past 20 years. Choose four significant drops in the index during this time period and investigate economic or political events that occurred immediately before or during these declines. Briefly describe the events and their likely effect on the stock market.

REPORT-WRITING SKILLS

15-25. Message Strategies: Informational Reports [LO-1] Life on the front lines of retail can be challenging for employees and managers alike. The work can be repetitive at times—and difficult at times, when employees must engage with unhappy or unpleasant customers. Managers, meanwhile, have the challenge of keeping employees motivated.

CASE TABLE 15.4 Selected Employment Data for Engineers and Marketing Staff

Employment Statistic	Engineering Department	Marketing Department
Average number of years of work experience	18.2	16.3
Average number of years of experience in current profession	17.8	8.6
Average number of years with company	12.4	7.9
Average number of years of college education	6.9	4.8
Average number of years between promotions	6.7	4.3
Salary range	$58–165k	$45–85k
Median salary	$77k	$62k

Your task: Assume you are a regional manager for Walmart and want to help your store managers find the best ways to motivate their staffs. Research the strategies and tactics that various retailers use to motivate their front-line employees. Choose the solutions that you believe would work best for Walmart and summarize your findings in a one- to two-page informational report.

REPORT-WRITING SKILLS

15-26. Message Strategies: Informational Reports [LO-1], [LO-4] You've been in your new job as human resources director for only a week, and already you have a major personnel crisis on your hands. Some employees in the marketing department got their hands on a confidential salary report and learned that, on average, marketing employees earn less than engineering employees. In addition, several top performers in the engineering group make significantly more than anybody in marketing. The report was instantly passed around the company by email, and now everyone is discussing the situation. You'll deal with the data security issue later; for now, you need to address the dissatisfaction in the marketing group.

Case Table 15.4 lists the salary and employment data you were able to pull from the employee database. You also had the opportunity to interview the engineering and marketing directors to get their opinions on the pay situation; their answers are listed in Case Table 15.5.

Your task: The CEO has asked for a short report summarizing whatever data and information you have on engineering and marketing salaries. Feel free to offer your own interpretation of the situation as well (make up any information you need), but keep in mind that because you are a new manager with almost no experience in the company, your opinion might not have a lot of influence.

REPORT-WRITING SKILLS/PORTFOLIO BUILDER/TEAM SKILLS

15-27. Message Strategies: Analytical Reports [LO-1], [LO-4] Anyone looking at the fragmented 21st-century landscape of media and entertainment options might be surprised to learn that poetry was once a dominant medium for not only

CASE TABLE 15.5 Summary Statements from Department Director Interviews

Question	Engineering Director	Marketing Director
1. Should engineering and marketing professionals receive roughly similar pay?	In general, yes, but we need to make allowances for the special nature of the engineering profession. In some cases, it's entirely appropriate for an engineer to earn more than a marketing person.	Yes.
2. Why or why not?	Several reasons: (1) Top engineers are extremely hard to find, and we need to offer competitive salaries; (2) the structure of the engineering department doesn't provide as many promotional opportunities, so we can't use promotions as a motivator the way marketing can; (3) many of our engineers have advanced degrees, and nearly all pursue continuing education to stay on top of the technology.	Without marketing, the products the engineers create wouldn't reach customers, and the company wouldn't have any revenue. The two teams make equal contributions to the company's success.
3. If we decide to balance pay between the two departments, how should we do it?	If we do anything to cap or reduce engineering salaries, we'll lose key people to our competitors.	If we can't increase payroll immediately to raise marketing salaries, the only fair thing to do is freeze raises in engineering and gradually raise marketing salaries over the next few years.

creative literary expression but also philosophical, political, and even scientific discourse.

Your task: With a team of fellow students, your challenge is to identify opportunities to increase sales of poetry—any kind of poetry, in any medium. The following suggestions may help you get started:

- Research recent bestsellers in the poetry field and try to identify why they have been popular.
- Interview literature professors, professional poets, librarians, publishers, and bookstore personnel.
- Consider art forms and venues in which verse plays an essential role, including popular music and poetry slams.
- Conduct surveys and interviews to find out why consumers don't buy more poetry.
- Review professional journals that cover the field of poetry, including *Publishers Weekly* and *Poets & Writers*, from both business and creative standpoints.

Summarize your findings in a brief formal report; assume that your target readers are executives in the publishing industry.

REPORT-WRITING SKILLS/PORTFOLIO BUILDER

15-28. Message Strategies: Informational Reports [LO-1] Health-care costs are a pressing concern at every level in the economy, from individual households to companies of all sizes to state and federal governments. Many companies are responding with *wellness programs* and other efforts to encourage employees to live healthier lifestyles and thereby reduce their need for expensive health care.

Your task: Research the wellness programs at Accenture, Google, and Microsoft, and then draft a brief report (one to two pages) that summarizes key elements of their wellness strategies and any measured outcomes that reflect the success or failure of these programs.

REPORT-WRITING SKILLS

15-29. Message Strategies: Analytical Reports [LO-1] Thousands of companies are currently involved in developing *fintech* (short for *financial technology*) software and mobile apps. Many of the mobile apps are designed to appeal to people who don't use traditional banking services.

Your task: Research three fintech apps, such as Acorn, Albert, and Digit. Review their websites and other promotional information to get a sense of their target customers and the benefits they offer. Write a one- to two-page report comparing the marketing approaches used by these three companies and identify which appeal you think is most effective at reaching people in your age group and general financial situation.

REPORT-WRITING SKILLS

15-30. Message Strategies: Informational Reports [LO-1] From its founding, the online shoe and clothing retailer Zappos has shunned the normal in pursuit of satisfied customers and happy employees. Its core values include "create fun and a little weirdness" and "be adventurous, creative, and open-minded." A television profile of the company once said it "might be the wackiest workplace in America." The quest to do things differently extends to organizational and managerial strategies as well, with a radical approach to self-organization and self-management called Holacracy.

Your task: Research Zappos's use of Holacracy, using both the company's own communication on the topic (see www.zapposinsights.com/about/holacracy) and outside assessments from business journalists. Draft a brief report (one to two pages) that summarizes what Holacracy is and why Zappos decided to use it.

REPORT-WRITING SKILLS/PORTFOLIO BUILDER

15-31. Message Strategies: Informational Reports [LO-1], [LO-4] Tesla gets a lot of media attention for its electric vehicles, but many automakers now market electric models.

Your task: Research six electric cars currently on the market and write a short informational report identifying each manufacturer and describing its electric vehicle(s). Explain how each manufacturer positions its model(s) in the market (as luxury models, family oriented, and so on), and provide a summary assessment of what the automotive press thinks of it.

Long Reports

REPORT-WRITING SKILLS/PORTFOLIO BUILDER

15-32. Message Strategies: Analytical Reports [LO-1] Like any other endeavor that combines factual analysis and creative free thinking, the task of writing business plans generates a range of opinions.

Your task: Find at least six sources of advice on writing successful business plans (focus on start-up businesses that are likely to seek outside investors). Use at least two books, two magazine or journal articles, and two websites or blogs. Analyze the advice you find and identify points where most or all the experts agree and points where they don't agree. Wherever you find points of significant disagreement, identify which opinion you find most convincing and explain why. Summarize your findings in a formal report.

REPORT-WRITING SKILLS

15-33. Message Strategies: Informational Reports [LO-1], [LO-4] Your company is the largest private employer in your metropolitan area, and the 43,500 employees in your workforce have a tremendous impact on local traffic. A group of city and county transportation officials recently approached your CEO with a request to explore ways to reduce this impact. The CEO has assigned you the task of analyzing the workforce's transportation habits and attitudes as a first step toward identifying potential solutions. He's willing to consider anything from

subsidized bus passes to company-owned shuttle buses to telecommuting, but the decision requires a thorough understanding of employee transportation needs. Case Tables 15.6 through 15.10 summarize data you collected in an employee survey.

Your task: Present the results of your survey in an informational report, using the data provided in the tables.

CASE TABLE 15.6 Employee Carpool Habits

Frequency of Use: Carpooling	Portion of Workforce
Every day, every week	10,138 (23%)
Certain days, every week	4,361 (10%)
Randomly	983 (2%)
Never	28,018 (64%)

CASE TABLE 15.7 Use of Public Transportation

Frequency of Use: Public Transportation	Portion of Workforce
Every day, every week	23,556 (54%)
Certain days, every week	2,029 (5%)
Randomly	5,862 (13%)
Never	12,053 (28%)

CASE TABLE 15.8 Effect of Potential Improvements to Public Transportation

Which of the Following Would Encourage You to Use Public Transportation More Frequently? (check all that apply)	Portion of Respondents
Increased perception of safety	4,932 (28%)
Improved cleanliness	852 (5%)
Reduced commute times	7,285 (41%)
Greater convenience: fewer transfers	3,278 (18%)
Greater convenience: more stops	1,155 (6%)
Lower (or subsidized) fares	5,634 (31%)
Nothing could encourage me to take public transportation	8,294 (46%)

Note: This question was asked of respondents who use public transportation randomly or never, a subgroup that represents 17,915 employees, or 41 percent of the workforce.

CASE TABLE 15.9 Distance Traveled to/from Work

Distance You Travel to Work (one way)	Portion of Workforce
Less than 1 mile	531 (1%)
1–3 miles	6,874 (16%)
4–10 miles	22,951 (53%)
11–20 miles	10,605 (24%)
More than 20 miles	2,539 (6%)

CASE TABLE 15.10 Is Telecommuting an Option?

Does the Nature of Your Work Make Telecommuting a Realistic Option?	Portion of Workforce
Yes, every day	3,460 (8%)
Yes, several days a week	8,521 (20%)
Yes, random days	12,918 (30%)
No	18,601 (43%)

REPORT-WRITING SKILLS/PORTFOLIO BUILDER

15-34. Message Strategies: Analytical Reports [LO-1], [LO-4] As a college student and an active consumer, you may have considered one or more of the following questions at some point in the past few years:

- What criteria distinguish the top-rated MBA programs in the country? How well do these criteria correspond to the needs and expectations of business? Are the criteria fair for students, employers, and business schools?
- Which of three companies you might like to work for has the strongest corporate ethics policies?
- What will the music industry look like in the future? Will the streaming model exemplified by Spotify dominate music consumption, even though many artists criticize it for the paltry royalties this approach pays artists?
- Which industries and job categories are forecast to experience the greatest growth—and therefore the greatest demand for workers—in the next 10 years?
- What has been the impact of Starbucks's aggressive growth on small, independent coffee shops? On midsized chains or franchises? In the United States or in another country?
- How large is the "industry" of major college sports? How much do the major football or basketball programs contribute—directly or indirectly—to other parts of a typical university?
- How much have minor-league sports—baseball, hockey, arena football—grown in small- and medium-market cities? What is the local economic impact when these municipalities build stadiums and arenas?

Your task: Answer one of the preceding questions using information from secondary research sources. Be sure to document your sources using the format your instructor indicates. Give conclusions and offer recommendations where appropriate.

REPORT-WRITING SKILLS/PORTFOLIO BUILDER

15-35. Message Strategies: Analytical Reports [LO-1] An observer surveying the current consumer electronics landscape and seeing Apple products everywhere might be surprised to learn that during part of the company's history, it was regarded by some as a fairly minor player in the computer industry—and at times a few pundits even wondered whether the company would survive.

Your task: In a two- to three-page report, identify the reasons Apple has been successful and explain how other companies can apply Apple's strategies and tactics to improve their business results.

REPORT-WRITING SKILLS

15-36. Message Strategies: Analytical Reports [LO-1] After 15 years in the corporate world, you're ready to strike out on your own. Rather than building a business from the ground up, however, you think that buying a franchise is a better idea. Unfortunately, some of the most lucrative franchise opportunities, such as the major fast-food chains, require significant start-up costs—some more than a half-million dollars. Fortunately, you've met several potential investors who seem willing to help you get started in exchange for a share of ownership. Between your own savings and money from these investors, you estimate that you can raise from $350,000 to $600,000, depending on how much ownership share you want to cede to the investors.

You've already worked in several functional areas, including sales and manufacturing, so you have a well-rounded business résumé. You're open to just about any type of business, too, as long as it provides the opportunity to grow; you don't want to be so tied down to the first operation that you can't turn it over to a hired manager and expand into another market.

Your task: To convene a formal meeting with the investor group, you first need to draft a report that outlines the types of franchise opportunities you'd like to pursue. Write a brief report identifying five franchises that you would like to explore further. (Choose five based on your own personal interests and the criteria already identified.) For each possibility, identify the nature of the business, the financial requirements, and the level of support the company provides. For each opportunity, write a brief statement of why you could run such a business successfully (make up any details you need). Be sure to carefully review the information you find about each franchise company to make sure you can qualify for it. For instance, McDonald's doesn't allow investment partnerships to buy franchises, so you won't be able to start up a McDonald's outlet until you have enough money to do it on your own. For a quick introduction to franchising, see How Stuff Works (**www.howstuffworks.com**) and search for "Franchising." You can learn more about the business of franchising at Franchising.com (**www.franchising.com**) and search for specific franchise opportunities at Francorp (**francorp.com**). In addition, many companies that sell franchises, such as Subway, offer additional information on their websites.

Proposals

PROPOSAL-WRITING SKILLS

15-37. Message Strategies: Proposals [LO-1] Select a product you are familiar with and imagine that you are the manufacturer trying to get a local retail outlet to carry it.

Your task: Research the product online and in person if possible to learn as much as you can about it, then write an unsolicited sales proposal in letter format to the owner (or manager) of the store, proposing that the item be stocked. Use the information you gathered on the product's features and benefits to make a compelling case for why the product would be a strong seller for the store. Then make up some reasonable figures, highlighting what the item costs, what it can be sold for, and what services your company provides (return of unsold items, free replacement of unsatisfactory items, necessary repairs, and so on).

PROPOSAL-WRITING SKILLS

15-38. Message Strategies: Proposals [LO-3] One of the banes of apartment living is those residents who don't care about the condition of their shared surroundings. They might leave trash all over the place, dent walls when they move furniture, spill food and beverages in common areas, destroy window screens, and otherwise degrade living conditions for everyone. Landlords obviously aren't thrilled about this behavior, either, because it raises the costs of cleaning and maintaining the facility.

Your task: Assume that you live in a large apartment building some distance from campus. Write an email proposal that you could send to your landlord, suggesting that fostering a sense of stronger community among residents in your building might help reduce incidents of vandalism and neglect. Propose that the little-used storage area in the basement of the building be converted to a community room, complete with a simple kitchen and a large-screen television. By attending Super Bowl parties and other events there, residents could get to know one another and perhaps forge bonds that would raise the level of shared concern for their living environment. You can't offer any proof of this in advance, of course, but share your belief that a modest investment in this room could pay off long term in lower repair and maintenance costs. Moreover, it would be an attractive feature to entice new residents.

PROPOSAL-WRITING SKILLS

15-39. Message Strategies: Proposals [LO-1], [LO-3] Presentations can make—or break—careers and businesses. A good presentation can bring in millions of dollars in new sales or fresh investment capital. A bad presentation might cause any number of troubles, from turning away potential customers to upsetting fellow employees to derailing key projects. To help business professionals plan, create, and deliver more effective presentations, you offer a three-day workshop that covers the essentials of good presentations:

- Understanding your audience's needs and expectations
- Clarifying your presentation objectives
- Choosing an organizational approach
- Crafting openings that catch your audience's attention
- Creating effective graphics and slides
- Practicing and delivering your presentation
- Leaving a positive impression on your audience
- Avoiding common mistakes with presentation slides
- Making presentations online using webcasting tools

- Handling questions and arguments from the audience
- Overcoming the top 10 worries of public speaking (including *How can I overcome stage fright?* and *I'm not the performing type; can I still give an effective presentation?*)

Workshop benefits: Students will learn how to prepare better presentations in less time and deliver them more effectively.

Who should attend: Top executives, project managers, employment recruiters, sales professionals, and anyone else who gives important presentations to internal or external audiences.

Your qualifications: Eighteen years of business experience, including 14 years in sales and 12 years of public speaking. Experience speaking to audiences as large as 5,000 people. More than a dozen speech-related articles published in professional journals. Have conducted successful workshops for nearly 100 companies.

Workshop details: Three-day workshop (9 A.M. to 3:30 P.M.) that combines lectures, practice presentations, and both individual and group feedback. Minimum number of students per workshop: 6. Maximum number of students: 12.

Pricing: The cost is $3,500, plus $100 per student; 10 percent discount for additional workshops.

Other information: Each attendee will have the opportunity to give three practice presentations that will last from three to five minutes. Everyone is encouraged to bring PowerPoint files containing slides from actual business presentations. Each attendee will also receive a workbook and a video recording of his or her final class presentation. You'll also be available for phone or email coaching for six months after the workshop.

Your task: Choose one of these companies as a target client for your next workshop: Accenture, Deloitte, Kimley-Horn, KPMG, or McKinsey & Company. Learn more about the company by visiting its website so you can personalize your proposal. Using the information listed above, prepare a sales proposal that explains the benefits of your training and what students can expect during the workshop.

PROPOSAL-WRITING SKILLS/PORTFOLIO BUILDER

15-40. Message Strategies: Proposals [LO-1], [LO-3] For years, a controversy has been brewing over the amount of junk food and soft drinks being sold through vending machines in public schools. Schools benefit from revenue-sharing arrangements, but many parents and health experts are concerned about the negative effects of these snacks and beverages. You and your brother have almost a decade of experience running espresso and juice stands in malls and on street corners, and you'd love to find some way to expand your business into schools. After a quick brainstorming session, the two of you craft a plan that makes good business sense while meeting the financial concerns of school administrators and the nutritional concerns of parents and dietitians. Here are the notes from your brainstorming session:

- Set up portable juice bars on school campuses, offering healthy fruit and vegetable drinks along with simple, healthy snacks
- Offer schools 30 percent of profits in exchange for free space and long-term contracts
- Provide job-training opportunities for students (during athletic events, for example)
- Provide a detailed dietary analysis of all products sold
- Establish a nutritional advisory board comprising parents, students, and at least one certified health professional
- Assure schools and parents that all products are safe (for example, no stimulant drinks, no dietary supplements)
- Support local farmers and specialty food preparers by buying locally and giving these vendors the opportunity to test-market new products at your stands

Your task: Based on the ideas listed, draft a formal proposal to the local school board outlining your plan to offer healthier alternatives to soft drinks and prepackaged snack foods. Invent any details you need to complete your proposal.

PROPOSAL-WRITING SKILLS/PORTFOLIO BUILDER/TEAM SKILLS

15-41. Message Strategies: Proposals [LO-1], [LO-3] It seems like everybody in your firm is frustrated. On the one hand, top executives complain about the number of lower-level employees who want promotions but just don't seem to "get it" when it comes to dealing with customers and the public, recognizing when to speak out and when to be quiet, knowing how to push new ideas through the appropriate channels, and performing other essential but difficult-to-teach tasks. On the other hand, ambitious employees who'd like to learn more feel that they have nowhere to turn for career advice from people who've been there. In between, a variety of managers and midlevel executives are overwhelmed by the growing number of mentoring requests they're getting, sometimes from employees they don't even know.

You've been assigned the challenge of proposing a formal mentoring program—and a considerable challenge it is:

- The number of employees who want mentoring relationships far exceeds the number of managers and executives willing and able to be mentors. How will you select people for the program?
- The people most in demand for mentoring also tend to be some of the busiest people in the organization.
- After several years of belt tightening and staff reductions, the entire company feels overworked; few people can imagine adding another recurring task to their seemingly endless to-do lists.
- What's in it for the mentors? Why would they be motivated to help lower-level employees?
- How will you measure the success or failure of the mentoring effort?

Your task: With a team assigned by your instructor, identify potential solutions to the issues (make up any information you need) and draft a proposal to the executive committee for a formal, companywide mentoring program that would match selected employees with successful managers and executives.

PROPOSAL-WRITING SKILLS/PORTFOLIO BUILDER/TEAM SKILLS

15-42. Message Strategies: Proposals [LO-1] Either to create opportunities in a slow job market or to avoid traditional employment altogether, some college graduates create their own jobs as independent freelancers or as entrepreneurs launching new companies.

Your task: Assemble a team of classmates as your instructor directs, then brainstorm all the services you could perform for local businesses. Identify as many services as you can that are related to you and your teammates' college majors and career interests, but also include anything you are willing to do to generate revenue. Next, identify a specific company that might have some opportunities for you. Outline and draft a short proposal that describes what your team can do for this company, how the company would benefit from your services, why you're the right people for the job, and how much you propose to charge for your services. Remember that this is an unsolicited proposal, so be sure introduce it accordingly.

Endnotes

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PART 6 Developing and Delivering Business Presentations

CHAPTER 16 Developing Presentations in a Social Media Environment

CHAPTER 17 Enhancing Presentations with Slides and Other Visuals

Presentations give you the opportunity to put all your communication skills on display, from audience analysis and research to the design of presentation materials to public speaking. Learn how to plan effective presentations, overcome the anxieties that every speaker feels, respond to questions from the audience, and embrace the Twitter-enabled backchannel. Discover some tips and techniques for succeeding with online presentations, an increasingly common mode of communication in today's environment. Complement your talk with compelling visual materials, and learn how to create presentation slides that engage and excite your audience.



10'000 Hours/DigitalVision/Getty Images

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16 Developing Presentations in a Social Media Environment

LEARNING OBJECTIVES

After studying this chapter, you will be able to

1. Describe the tasks involved in analyzing the situation for a presentation and organizing a presentation.
2. Explain how to adapt to your audience and develop an effective opening, body, and close for a presentation.
3. Discuss five steps for delivering a successful presentation.
4. Explain the growing importance of the backchannel in presentations, and list six steps for giving effective presentations online.



Max Gordon/Barnett International Inc.

Communication coach Gina Barnett advises speakers to learn how to read and use their body's signals to become more relaxed, open, and engaging.

COMMUNICATION CLOSE-UP AT
Barnett International

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Presentations have much in common with other business communication efforts, from analyzing the situation and defining your purpose to gathering information and crafting audience-focused messages. They have one major difference, of course: Presentations are *performances*, and a good message isn't enough. How you perform in front of an audience has a major influence on how these listeners respond to your message.

From her years of experience in the theater, communication coach Gina Barnett knows that the performance makes or breaks the presentation. A strong performance makes any message more compelling, whereas a weak performance can undermine even the best messages.

Although performance is vital, it's a mistake to think that only actors or extroverts have some special performance gift. All business professionals can learn to use their bodies to perform more effectively while giving speeches and making presentations. Being mindful of your physical habits and mannerisms, from how you hold your head to the way you use your feet, can make you a more effective speaker. And there's a bonus: You'll enjoy it more, too. A body-mindful approach to speaking can help you control the anxiety that every presenter feels and harness that energy for a more natural and engaging experience.

In her performance-coaching work with corporate executives, Barnett helps presenters explore the key centers in the human body that regulate how speakers feel and how they come across to others, both visually and vocally. For example, it's easy to think a smile is merely a *reaction* to a pleasant thought or experience, but smiles can also instigate positive thoughts. The physical act of smiling can trigger improvements in your own mood and in the moods of people watching you. A warm smile helps the audience connect with you and conveys your confidence in yourself and in your message. Smiling also forces you to relax your jaw and facial muscles, which helps to release pent-up stress and improve your vocal clarity and projection. With so many benefits to offer, the simple act of smiling as you step onto the stage can launch your presentation on a strong note.

Barnett tells speakers to think of their bodies as communication instruments and to use them to their full potential, in much the same way musicians use their instruments. Like a musical instrument, your body can be treated well or poorly and played with varying degrees of success.

Using your physical self to full advantage starts with understanding the signals your body is sending to you and to the people in your audience. Tune in to your body and listen to its signals. If you are anxious leading up to a presentation, you may feel this signal in your shoulders, your jaw, or wherever you tend to "collect" stress. Explore that emotion and try to determine why you feel that way. You may identify some reasons that are real and relevant to the situation and some that are noise or distractions, at least as far as the immediate situation is concerned.

A real and extremely relevant reason might be that you haven't prepared thoroughly and therefore lack confidence in your ability to present your message or respond to audience questions. Assuming you've given yourself enough time, you can address this source of anxiety by finishing your preparation. A less relevant source of stress might be a buried memory of being embarrassed in front of your class as a child. This emotional mishap might still be stuck in your memory at some deep level, but it doesn't need to be part of who you are as a professional adult.

Barnett emphasizes that by dismissing irrelevant sources of stress and proactively dismantling relevant sources of stress, your mind can then tell your body that you're ready to go. This confidence will change the way you carry and present yourself onstage, it will give your voice fresh energy, and it will spread to your audience—your confidence in yourself will make them more confident in you, too. Rather than rushing through your presentation with your mind a nervous whirl, hoping only to make it through in one piece and get off the stage, you'll enjoy being in the moment and sharing your ideas and inspiration.[1]

Planning a Presentation

1 LEARNING OBJECTIVE
Describe the tasks involved in analyzing the situation for a presentation and organizing a presentation.

Business presentations involve all your communication skills, from research through nonverbal communication, and they let you demonstrate your business acumen as well.

Feeling nervous before a presentation is normal, and there are positive steps you can take to reduce your anxiety.

Gina Barnett (profiled in the chapter-opening Communication Close-Up) recognizes the importance of being your best and most authentic self when you're giving presentations. Presentations offer important opportunities to put all your communication skills on display, including research, planning, writing, visual design, and interpersonal and nonverbal communication. Presentations also let you demonstrate your ability to think on your feet, grasp complex business issues, and handle challenging situations—all attributes that executives look for when searching for talented employees to promote.

If the thought of giving a speech or presentation makes you nervous, keep three points in mind. First, everybody gets nervous when speaking in front of groups. Second, being nervous is actually a good thing; it means you care about the topic, your audience, and your career success. Third, with practice, you can convert those nervous feelings into positive energy that helps you give more compelling presentations. You can take control of the situation by using the three-step writing process to prepare for successful presentations (see Figure 16.1).

Planning presentations is much like planning any other business message: You analyze the situation, gather information, select the right medium, and organize the information. Gathering information for presentations is essentially the same as for written communication projects. The other three planning tasks have some special applications when it comes to presentations; they are covered in the following sections.

Creating a high-quality presentation for an important event can take many days, so be sure to allow enough time.

Be aware that preparing a professional-quality business presentation takes time. Nancy Duarte, a presentation design expert profiled in Chapter 17, offers this rule of thumb: For a 1-hour presentation that uses 30 slides, allow 36 to 90 hours to research, conceive, create, and practice.[2] Not every one-hour presentation justifies a week or two of preparation, of course, but the important presentations that can make your career or your company certainly can.

ANALYZING THE SITUATION

The purpose of most business presentations is to inform or persuade; you may also give presentations designed primarily to collaborate with others.

As with written communications, analyzing the situation for a presentation involves defining your purpose and developing an audience profile. The purpose of most of your presentations will be to inform or to persuade, although you may occasionally need to make a collaborative presentation, such as when you're leading a problem-solving or brainstorming session. Given the time limitations of most presentations and the live nature of the event, make sure your purpose is crystal clear so that you make the most of the opportunity and show respect for your listeners' time and attention.

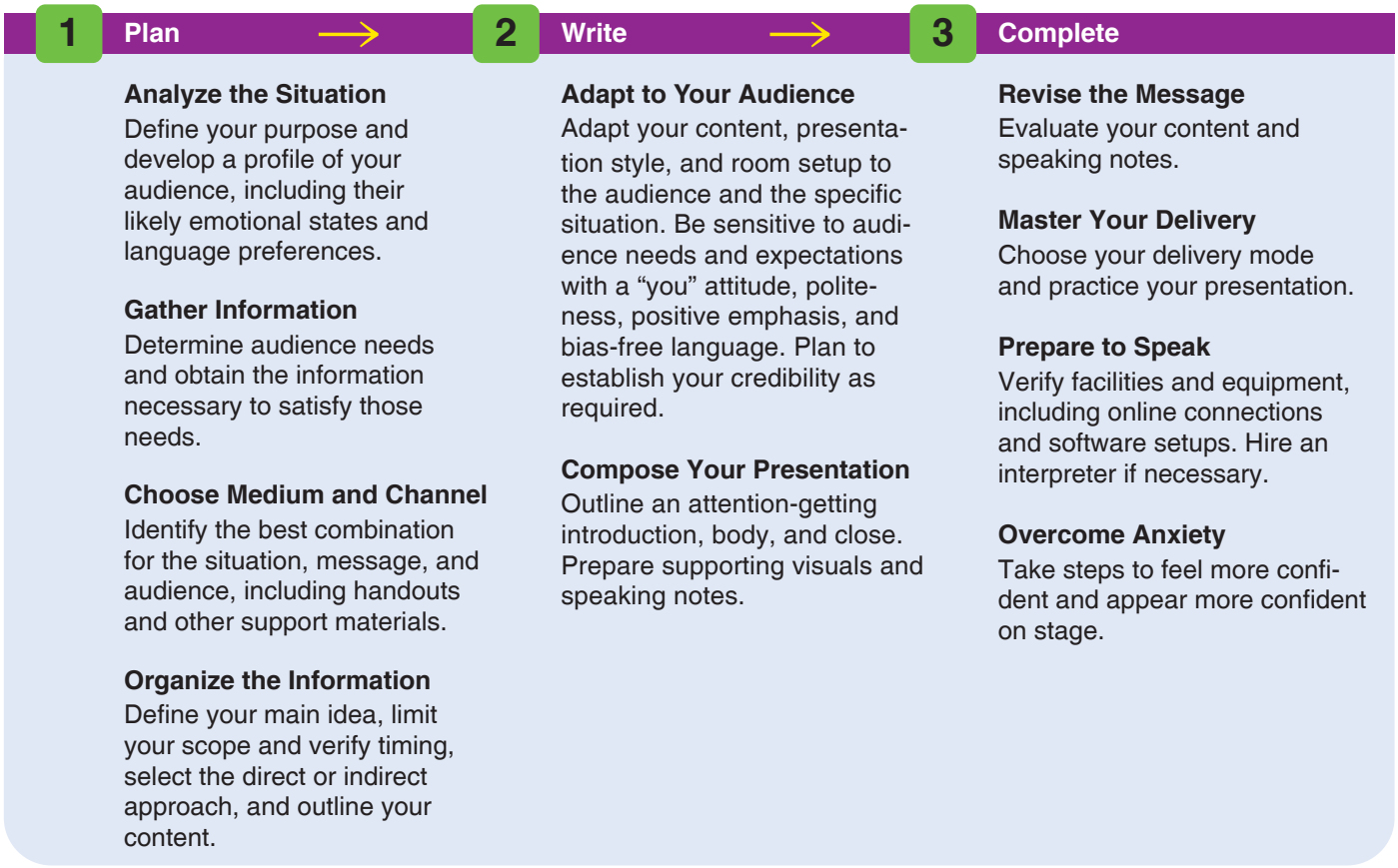


Figure 16.1 The Three-Step Process for Developing Presentations
Although you rarely "write" a presentation or speech in the sense of composing every word ahead of time, the tasks in the three-step writing process adapt quite well to the challenge of planning, creating, and delivering presentations.

When you develop your audience profile, try to anticipate the likely emotional state of your audience members. Figure 16.2 on the next page offers tips for dealing with a variety of audience mindsets.

Knowing your audience's state of mind will help you adjust both your message and your delivery.

You also need to determine whether your audience is comfortable listening to the language you speak. Listening to an unfamiliar language is much more difficult than reading that language, so an audience that might be able to read a written report might not be able to understand a presentation covering the same material. When speaking to an international audience, keep in mind that audience members' language fluency might vary widely. So take special care to ensure clear communication: Speak slowly and distinctly, repeat key words and phrases, keep your word choices and sentence structures simple, communicate with body language, and support your spoken message with visuals.

Also consider the circumstances in which you'll be making your presentation. Will you speak to five people in a conference room where you can control everything from light to sound to temperature? Or will you be demonstrating a product on the hectic floor of a trade show, where you might have from 1 to 100 listeners and little control over the environment? Will everyone be in the same room, or will some or all your audience participate from remote locations? What equipment will you have at your disposal?

Learn as much as you can about the setting and circumstances of your presentation, from the size of the audience to seating arrangements to potential interruptions.

For in-person presentations, pay close attention to seating arrangements. The four basic formats for presentations have distinct advantages and disadvantages:

- **Classroom or theater seating**, in which all chairs or desks face forward, helps keep attention focused on the speaker and is usually the best method for accommodating large audiences. However, this arrangement inhibits interaction among audience members, so it is not desirable for brainstorming or other collaborative activities.

Check out the "Five-Minute Guide to Planning Presentations" at the end of the chapter.

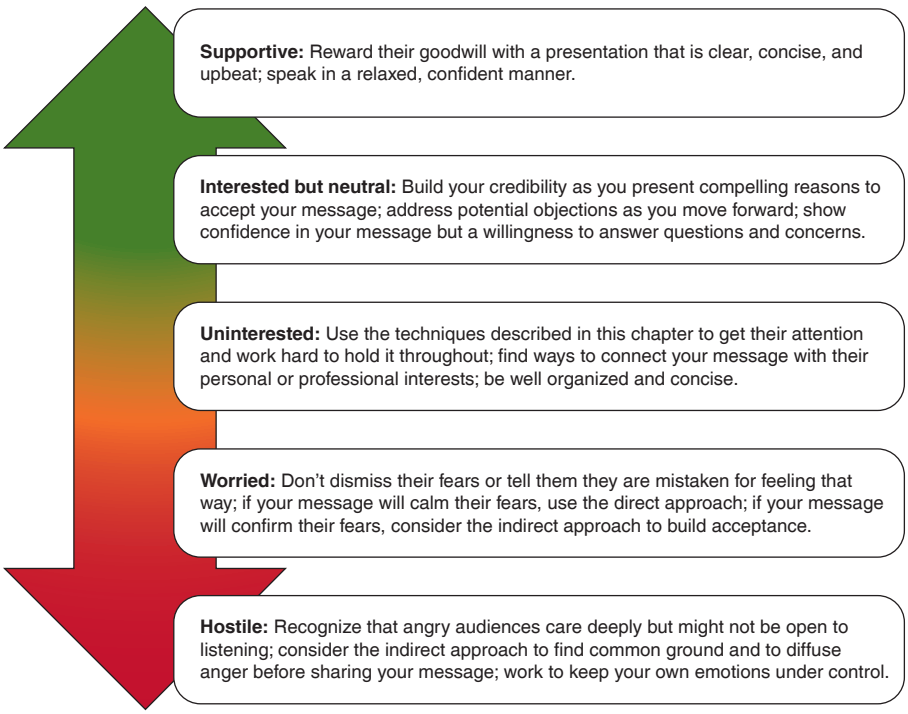


Figure 16.2 Planning for Various Audience Mindsets
Try to assess the emotional state of your audience ahead of time so you can plan your presentation approach accordingly.

- **Conference table seating**, in which people sit along both sides of a long table and the speaker stands at one end, is a common arrangement for smaller meetings. It promotes interaction among attendees, but it tends to isolate the speaker at one end of the room.
- **Horseshoe, or *U*-shaped, seating**, in which tables are arranged in the shape of a *U*, improves on conference table seating by allowing the speaker to walk between the tables to interact with individual audience members.
- **Café seating**, in which people sit in groups at individual tables, is best for breakout sessions and other small-group activities. However, this arrangement is less than ideal for anything more than short presentations because it places some in the audience with their backs to the speaker, making it awkward for both them and the presenter.

All these variables can influence not only the style of your presentation but the content. For instance, in a public environment full of distractions and uncertainties, you're probably better off keeping your content simple and short because chances are you won't be able to keep everyone's attention for the duration of your presentation.

Table 16.1 offers a summary of the key steps in analyzing an audience for presentations. For even more insight into audience evaluation (including emotional and cultural issues), consult a good public-speaking textbook.

SELECTING THE BEST COMBINATION OF MEDIA AND CHANNELS

Webcasts are online presentations that people either view live or download later from the web; *screencasts* are recordings of activity on computer displays with audio voiceover.

For some presentations, you'll be expected to use whatever media and channels your audience, your boss, or the circumstances require. For example, you might be required to use specific presentation software and a conference room's built-in display system or your company's online meeting software. For other presentations, you might have an array of choices, from live, in-person presentations to **webcasts** (online presentations

TABLE 16.1 Analyzing Audiences for Business Presentations

Task	Actions
To determine audience size and composition	• Estimate how many people will attend (in person and online). • Identify what they have in common and how they differ. • Analyze the mix of organizational positions, professions, language fluencies, and other demographic factors that could influence your content and delivery choices.
To predict the audience's probable reaction	• Analyze why audience members are attending the presentation. • Determine the audience's general attitude toward the topic: interested, moderately interested, unconcerned, open-minded, or hostile. • Analyze your audience's likely mood when you speak to them. • Find out what kind of supporting information will help the audience accept and respond to your message: technical data, historical information, financial data, demonstrations, samples, and so on. • Consider whether the audience has any biases that might work against you. • Anticipate possible objections or questions.
To gauge the audience's experience	• Analyze whether everybody has the same background and level of understanding. • Determine what the audience already knows about the subject. • Consider whether the audience is familiar with the vocabulary you intend to use. • Analyze what the audience expects from you. • Think about the mix of general concepts and specific details you will need to present.

that people either view live or download later from the web) to **screencasts** (recordings of activity on computer displays with audio voiceover). Whatever the technology, try to spend some time with it before delivering your presentation so that you can use it smoothly while you talk.

ORGANIZING A PRESENTATION

The possibilities for organizing a business presentation fall into two basic categories: *linear* or *nonlinear*. Linear presentations are like printed documents in the sense that they are outlined like conventional messages and follow a predefined flow from start to finish. The linear model is appropriate for speeches, technical and financial presentations, and other presentations in which you want to convey your message point by point or build up to a conclusion following logical steps.

Linear presentations generally follow a fixed path or outline from start to finish.

In contrast, a nonlinear presentation doesn't flow in a predefined sequence but rather gives the presenter the option to move back and forth between topics and up and down in terms of level of detail. Nonlinear presentations can be useful when you want to be able to show complicated relationships between multiple ideas or elements, to zoom in and out between the "big picture" and specific details, to explore complex visuals, or to have the flexibility to move from topic to topic in any order.

Nonlinear presentation can move back and forth between topics and up and down in levels of detail.

The difference between the two styles can be seen in the type of software typically used to create and deliver a presentation. Microsoft PowerPoint, Apple Keynote, Google Slides, and similar packages use sequences of individual slides, often referred to as a *slide deck*. The slides don't necessarily need to be presented in a strict linear order because the presenter does have the option of jumping out of the predefined order, but in most presentations using slides, the speaker moves from start to finish in that order.

Prezi is the best-known nonlinear presentation software and doesn't use the concept of individual slides. Instead, you start from a main screen, or canvas, which often presents the big picture overview of your topic (see Figure 16.3 on the next page). From there, you add individual objects (including blocks of text, photos, or videos) that convey specific information points. When you present, you can zoom in and out, discussing the individual objects and their relationship to the big picture and each other. You can also define a narrative flow by creating a path from one object to the next, which also lets people view the presentation on their own[3] (and effectively turns a Prezi presentation into a linear presentation).

MOBILE APP

The **Prezi** mobile app lets you take your presentations with you to practice or present on the go.

Prezi is sometimes viewed as a more dynamic and engaging way to present, and it certainly has that potential. However, keep several points in mind if you have a choice of which



Used with permission from Prezi Inc.

Figure 16.3 Nonlinear Presentations
Nonlinear presentations, particularly those using the cloud-based Prezi system, give the presenter more freedom in zooming in and out between the big picture and the details and in covering topics in any order. With this template provided by Prezi, for instance, a presenter could set up six subtopics that can be zoomed into and discussed in any order.

Remember that presentations—using any software or system—are not about flash and dazzle; they are about sharing ideas, information, and emotions with your audience.

approach to take and which software to use. First, match the tool to the task, not the other way around. A detailed technical discussion might need a linear presentation, whereas a free-form brainstorming session might benefit from a nonlinear approach, for example. Second, if they are used well, software features can help you tell your story, but your story is what matters—not the software. If they are used poorly, software features only get in the way. (Overuse of zooming in Prezi is a good example of this.[4]) Third, despite their reputation, PowerPoint and other conventional slide programs aren't limited to creating boring, linear flows of bullet points (see "Choosing Structured or Free-Form Slides" on page 493 in Chapter 17).

Defining Your Main Idea

Regardless of which overall approach you take, a successful presentation starts with a clear picture of the main idea you want to share with your audience. Start by composing a one-sentence summary that links your subject and purpose to your audience's frame of reference. Here are some examples:

> Convince management that reorganizing the technical support department will improve customer service and reduce employee turnover.
>
> Convince the board of directors that we should build a new plant in Texas to eliminate manufacturing bottlenecks and improve production quality.
>
> Address employee concerns regarding a new health-care plan by showing how the plan will reduce costs and improve the quality of their care.

Each of these statements puts a particular slant on the subject rather than simply indicating the general topic. As with any communication effort, make sure your purpose aligns your goals with your audience's interests. For example, a group of new employees will be much more responsive to your discussion of plant safety procedures if you focus on how the procedures can save lives and prevent injuries rather than on how they will save the company money or conform to government regulations.

Limiting your scope is important for two reasons: to ensure that your presentation fits the allotted time and to make sure you respect your audience members' time and attention.

Limiting Your Scope

Limiting your scope is important with any message, but it's particularly vital with presentations, for two reasons. First, for most presentations, you must work within strict

time limits. Second, the longer you speak, the more difficult it is to hold the audience's attention and the more difficult it is for your listeners to retain your key points.[5]

The only sure way to measure the length of your presentation is to complete a practice run.

The only sure way to know how much material you can cover in a given time is to practice your presentation after you complete it. As an alternative, if you're using conventional structured slides (see page 493), you can figure on three or four minutes per slide as a rough guide.[6] Of course, be sure to factor in time for introductions, coffee breaks, demonstrations, question-and-answer sessions, and anything else that takes away from your speaking time.

Approaching time constraints as a creative challenge can actually help you develop more effective presentations. Limitations can force you to focus on the most essential message points that are important to your audience.[7]

If you're having trouble meeting a time limit or just want to keep your presentation as short as possible, consider a hybrid approach in which you present your key points in summary form and give people printed handouts with additional detail.[8]

Choosing Your Approach

Organize a short presentation the same way you would a brief written message; organize a longer presentations as you would a report.

With a well-defined main idea to guide you and a clearly defined scope for your presentation, you can begin to arrange your message. If you have 10 minutes or less to deliver your message, organize your presentation much as you would a brief written message: Use the direct approach if the subject involves routine information or good news; use the indirect approach if the subject involves negative news or persuasion. Plan to spend a minute or two during your introduction to arouse interest and to give a preview of what's to come. For the body of the presentation, be prepared to explain the who, what, when, where, why, and how of your subject. In the final few moments, review the points you've made and close with a statement that will help your audience remember the subject of your speech (see Figure 16.4).

Progress Update: August 2021

Purpose: To update the Executive Committee on our product development schedule.

I. Review goals and progress.
   A. Mechanical design:
      1. Goal: 100%
      2. Actual: 80%
      3. Reason for delay: Unanticipated problems with case durability
   B. Software development:
      1. Goal: 50%
      2. Actual: 60%
   C. Material sourcing:
      1. Goal: 100%
      2. Actual: 45% (and materials identified are at 140% of anticipated costs)
      3. Reason for delay: Purchasing is understaffed and hasn't been able to research sources adequately.
II. Discuss schedule options.
   A. Option 1: Reschedule product launch date.
   B. Option 2: Launch on schedule with more expensive materials.
III. Suggest goals for next month.
IV. Q&A

Figure 16.4 Effective Outline for a 10-Minute Progress Report
Here is an outline of a short presentation that updates management on the status of a key project. The presenter has some bad news to deliver (either the product launch will have to be delayed or the materials costs will be higher than anticipated), so she opted for an indirect approach to lay out the reasons for the delay before sharing the news.

Longer presentations are organized more like reports. If the purpose is to inform, use the direct approach and a structure imposed naturally by the subject: importance, sequence, chronology, spatial orientation, geography, or category. If your purpose is to analyze, persuade, or collaborate, organize your material around conclusions and recommendations or around a logical argument. Use the direct approach if the audience is receptive and the indirect approach if you expect resistance.

For every presentation, keep your organization as simple as possible.

Regardless of the length of your presentation, remember to keep your organization clear and simple. If listeners lose the thread of your presentation, they'll have a hard time catching up and following your message in the remainder of your speech. Explain at the beginning how you've organized your material and try to limit the number of main points to three or four.

With every presentation, look for opportunities to integrate storytelling (see page 118) into the structure of your presentation. The dramatic tension (not knowing what will happen to the "hero") at the heart of effective storytelling is a great way to capture and keep the audience's attention.

Preparing Your Outline

In addition to planning your speech, an outline helps you plan your speaking notes.

A presentation outline helps you organize your message, and it serves as the foundation for delivering your speech. Prepare your outline in several stages:[9]

- State your purpose and main idea and then use these to guide the rest of your planning.
- Organize your major points and subpoints in logical order, expressing each major point as a single, complete sentence.
- Identify major points in the body first and then outline the introduction and close.
- Identify transitions between major points or sections and then write these transitions in full-sentence form.
- Prepare your bibliography or source notes; highlight those sources you want to identify by name during your talk.

You may find it helpful to create a simpler speaking outline from your planning outline.

Many speakers like to prepare both a detailed *planning outline* (see Figure 16.5) and a simpler *speaking outline* that provides all the cues and reminders they need to present their material. Follow these steps to prepare an effective speaking outline:[10]

- Start with the planning outline and strip away anything you don't plan to say directly to your audience.
- Condense points and transitions to key words or phrases.
- Add delivery cues, such as places where you want to pause for emphasis or to use visuals.
- Arrange your notes on numbered cards or use the notes capability in your presentation software.

Crafting Presentation Content

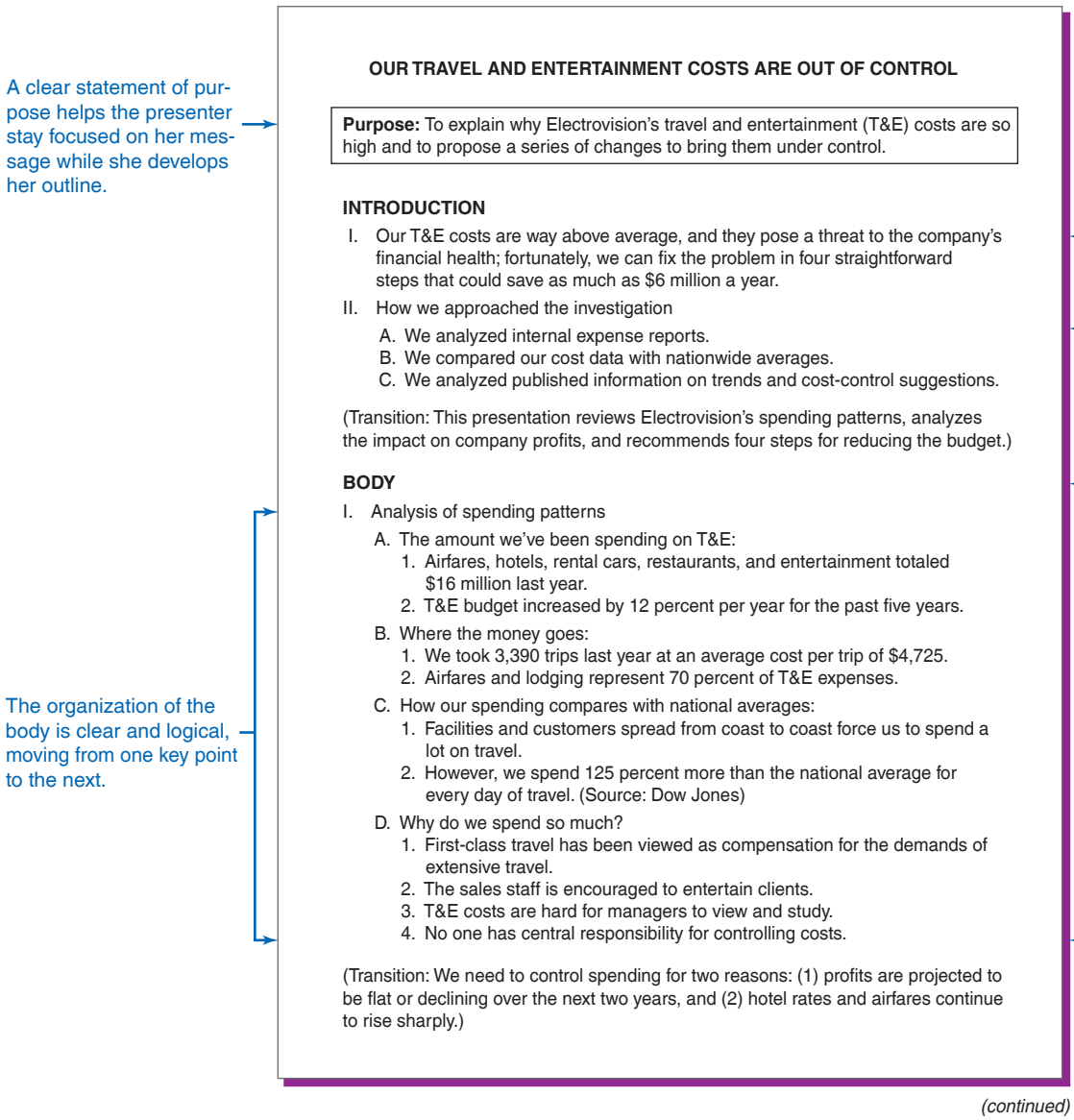
2 LEARNING OBJECTIVE
Explain how to adapt to your audience and develop an effective opening, body, and close for a presentation.

Although you usually don't write out a presentation word for word, you still engage in the writing process—developing your ideas, structuring support points, phrasing your transitions, and so on. Depending on the situation and your personal style, the eventual presentation might follow your initial words closely, or you might express your thoughts in fresh, spontaneous language. This section covers the tasks of adapting to your audience and developing your presentation; Chapter 17 covers the task of creating slides to accompany your talk.

ADAPTING TO YOUR AUDIENCE

Adapting to your audience involves a number of issues, from speaking style to technology choices.

Your audience's size, the venue (in person or online), your subject, your purpose, your budget, the time available for preparation, and the time allotted for your talk all influence the style of your presentation. If you're speaking to a small group, particularly people you already know, you can use a casual style that encourages audience participation. Use simple visuals and invite your audience to offer comments. Plan



(continued)

Figure 16.5 Effective Outline for a 30-Minute Presentation
This outline (based on Linda Moreno's report in Chapter 15) clearly identifies the purpose and the distinct points to be made in the introduction, body, and close. Notice also how the presenter wrote her major transitions in full sentence form to be sure she can clearly phrase these critical passages when it's time to speak.

to deliver your remarks in a conversational tone, using notes to jog your memory if necessary.

If you're addressing a large audience or if the event is important, establish a more formal atmosphere. During formal presentations, speakers are often on a stage or platform, standing behind a lectern and using a microphone so that their remarks can be heard throughout the room or captured for recording or webcasting.

If you're addressing an audience that doesn't speak your language, consider using an interpreter. Send your interpreter a copy of your speech and visuals as far in advance of your presentation as possible. If your audience is likely to include persons with hearing impairments, be sure to team up with a sign language interpreter as well. Alternatively, you can try automated translation tools available in your presentation software, such as the Presentation Translator add-in for PowerPoint.[11]

When you deliver a presentation to people from other cultures, take into account cultural differences in appearances, mannerisms, and other customs. Your interpreter or host will be able to suggest appropriate changes for a specific audience or occasion.

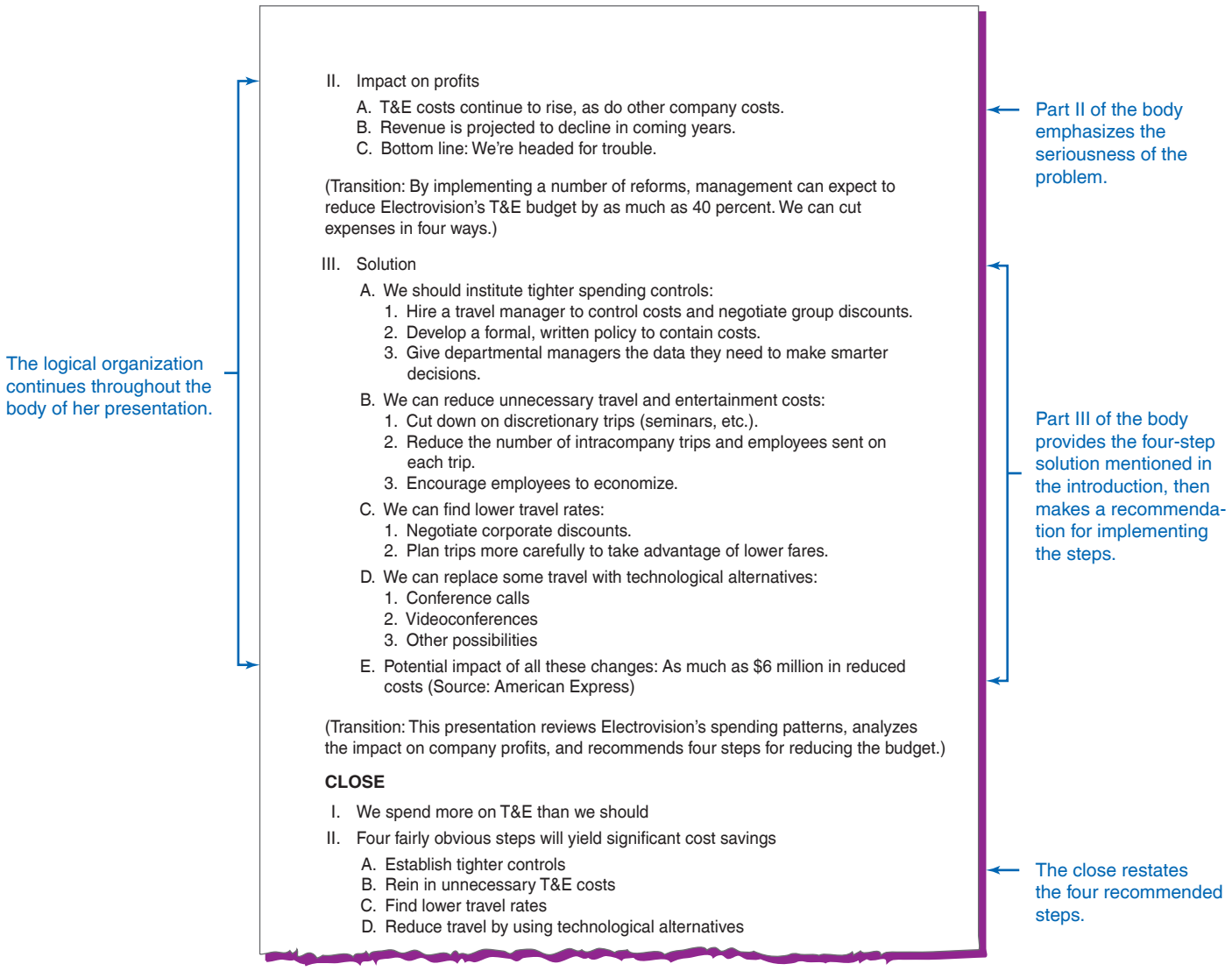


Figure 16.5 **Effective Outline for a 30-Minute Presentation (*Continued*)**

DEVELOPING YOUR PRESENTATION

Like written documents, presentations have three distinct sections: the introduction, the body, and the close.

Presentation Introduction

A good introduction arouses the audience's interest in your topic, establishes your credibility, and prepares the audience for what will follow. That's a lot to pack into the first few minutes of your presentation, so give yourself plenty of time to prepare the words and visuals you'll use to get your presentation off to a great start.

For anything other than routine presentations, spend some time crafting a compelling title for your presentation. A title focuses your efforts as you develop the presentation, and it establishes audience expectations as they prepare to listen to you. The title can also help promote the presentation if you can't be sure that everyone you'd like to reach will attend automatically. As with blog post titles, email subject lines, and other headlines, start with the most valuable benefit you have to offer the audience and phrase it in an intriguing, informative way. For example, "Advances in Artificial Intelligence" is a lot less compelling than "Five Ways Artificial Intelligence Could Threaten Our Business."

Getting Your Audience's Attention Some subjects are naturally more interesting to some audiences than others. If your presentation involves the health, wealth, or happiness of

your listeners, most of them will be interested regardless of how you begin. Other subjects call for more imagination. Here are seven ways to arouse audience interest:[12]

If your audience isn't likely to be naturally interested in your topic, your introduction will need to build interest by relating the subject to their personal concerns.

- **Unite the audience around a common goal.** Encourage your listeners to unite around a meaningful business objective. For example, if the company is struggling and your presentation offers a turnaround solution, you could start by urging your listeners to come together for the common good.
- **Describe a problem that affects or could affect your audience.** This problem may be something your listeners are already worried about, or it could be something they haven't even thought about but you believe they should.
- **Tell a story.** Craft a compelling story that illustrates an important and relevant point. If your entire presentation is structured as a story, of course, you'll want to keep the interest high by not giving away the ending yet.
- **Pass around product samples or other objects.** If your company is in the textile business, for example, let the audience handle some of your fabrics. The more of their senses you can engage, the more likely people are to remember your message.
- **Ask a question.** Asking a substantial and intriguing question can get the audience involved in your presentation topic. *Rhetorical questions* (those you don't expect the audience to provide answers to) can spur people to think about the key points of your talk.
- **Share a startling statistic.** An intriguing, unexpected, or shocking detail can often grab the attention of your listeners. Naturally, this detail needs to be relevant to your presentation's main idea.
- **Use humor.** Opening with an amusing observation about yourself, the subject matter of the presentation, or the circumstances surrounding the presentation can be an effective way to lighten the "pre-presentation jitters" for you and the audience or to make an emotional connection with your listeners. However, humor must be used with great care. Make sure any comments are relevant, appropriate, and not offensive to anyone in the audience. In general, avoid humor when you and the audience don't share the same native language or culture; it's too easy for humor to fall flat or backfire.

Building Your Credibility In addition to grabbing the audience's attention, your introduction needs to establish your credibility. If you're a well-known expert in the subject matter or have earned your audience's trust in other situations, you're already ahead of the game. If you have no working relationship with your audience or if you're speaking in an area outside your known expertise, however, you need to establish credibility.

Techniques for building credibility vary, depending on whether you will be introducing yourself or having someone else introduce you. If another person will introduce you, he or she can present your credentials so that you don't appear boastful. If you will be introducing yourself, keep your comments simple, but don't be afraid to mention your relevant experience and accomplishments. Your listeners will be curious about your qualifications, so tell them briefly who you are and why you're the right person to be giving this presentation. Here's an example:

If someone else will be introducing you to the audience, you can ask this person to present your credentials.

> I'm Karen Whitney, a market research analyst with Information Resources Corporation. For the past five years, I've specialized in studying high-technology markets. Your director of engineering, John LaBarre, has asked me to talk to you about recent trends in computer-aided design so that you'll have a better idea of how to direct your research efforts.

This speaker establishes credibility by tying her credentials to the purpose of her presentation without boasting. By mentioning her company's name, her specialization and position, and the name of the audience's boss, she lets her listeners know immediately that she is qualified to tell them something they need to know. She connects her background to their concerns.

Previewing Your Message In addition to arousing audience interest and establishing your credibility, a good introduction gives your audience members a preview of what's ahead, helping them understand the structure and content of your message. A report reader can

learn these things by looking at the table of contents and scanning the headings, but in a presentation you need to provide that framework with a preview.

Use the preview to help your audience understand the importance, the structure, and the general content of your message.

Your preview should summarize the main idea of your presentation, identify major supporting points, and indicate the order in which you'll develop those points. Tell your listeners in so many words, "This is the subject, and these are the points I will cover." Once you've established the framework, you can be confident that the audience will understand how the individual facts and figures are related to your main idea as you move into the body of your presentation. If you are using an indirect approach, your preview can discuss the nature of your main idea without disclosing it.

Presentation Body

The bulk of your speech or presentation is devoted to a discussion of the main supporting points from your outline. Whether you're using the direct or indirect approach, make sure the organization of your presentation is clear and your presentation holds the audience's attention.

Connecting Your Ideas In written documents, you can show how ideas are related with a variety of design clues: headings, paragraph indentions, white space, and lists. However, with oral communication—particularly when you aren't using visuals for support—you must rely primarily on spoken words to link various parts and ideas.

Use transitions to repeat key ideas and help the audience follow along, particularly in longer presentations.

For the links between sentences and paragraphs, use one or two transitional words: *therefore, because, in addition, in contrast, moreover, for example, consequently, nevertheless*, or *finally*. To link major sections of a presentation, use complete sentences or paragraphs, such as "Now that we've reviewed the problem, let's take a look at some solutions."

Every time you shift topics, be sure to stress the connection between ideas by summarizing what's been said and previewing what's to come. The longer your presentation, the more important your transitions. Your listeners need clear transitions to guide them to the most important points. Furthermore, they'll appreciate brief interim summaries to pick up any ideas they may have missed.

Holding Your Audience's Attention After you've successfully captured your audience's attention in your introduction, you need to work to keep it throughout the body of your presentation. Here are some helpful tips for keeping the audience tuned in to your message:

The most important way to hold an audience's attention is to show how your message relates to their individual needs and concerns.

- **Keep relating your subject to your audience's needs.** People are naturally most interested in things that affect them personally.
- **Anticipate your audience's questions.** Try to anticipate as many questions as you can and address these questions in the body of your presentation. You'll also want to prepare and reserve additional material to use during the question-and-answer period in case the audience asks for greater detail.
- **Keep it simple.** Don't overwhelm the audience with details, either in your slides or in your spoken message, particularly if you're presenting a complicated topic to people learning it for the first time.[13]
- **Use clear, vivid language.** If your presentation involves abstract ideas, show how those abstractions connect with everyday life. Use familiar words, short sentences, and concrete examples. Be sure to use some variety as well; repeating the same words and phrases puts people to sleep.
- **Ask for opinions or pause occasionally for questions or comments.** Don't assume that you need to hold off on questions until a formal question-and-answer (Q&A) session at the end of your talk. In fact, today's audiences tend to expect a more interactive give-and-take, so involve your audience members along the way.[14] Depending on the format and the tools available, you can solicit answers informally or via polling. Some presentation systems have polling capability that you can integrate directly into your presentation.[15] If appropriate for the material, you can also structure your presentation in such a way that you adapt it based on the answers you receive.
- **Illustrate your ideas with visuals.** Visuals enliven your message, help you connect with audience members, and help people remember your message.

Presentation Close

Plan your close carefully so that your audience leaves with your main idea clear in their minds.

The close of a speech or presentation has two critical jobs to accomplish: making sure your listeners leave with the key points from your talk clear in their minds and putting your audience in the appropriate emotional state. For example, if the purpose of your presentation is to warn managers that their out-of-control spending threatens the company's survival, you want them to leave with that message ringing in their ears—and with enough concern for the problem to stimulate changes in their behavior.

Restating Your Main Points Use the close to succinctly restate your main points, emphasizing what you want your listeners to do or to think. For example, to close a presentation on your company's executive compensation program, you could repeat your specific recommendations and then conclude with a memorable statement to motivate your audience to take action:

> We can all be proud of the way our company has grown. However, if we want to continue that growth, we need to take four steps to ensure that our best people don't start looking for opportunities elsewhere:
>
> - First, increase the overall level of compensation
> - Second, establish a cash bonus program
> - Third, offer a variety of stock-based incentives
> - Fourth, improve our health insurance and pension benefits
>
> By taking these steps, we can ensure that our company retains the management talent it needs to face our industry's largest competitors.

Ending with Clarity and Confidence

Think about how you will conclude your presentation so you can end on a strong, positive note.

If you've been successful with the introduction and body of your presentation, your listeners have the information they need and are in the right frame of mind to put that information to good use. Now you're ready to end on a strong note that confirms expectations about any actions or decisions that will follow the presentation—and to bolster the audience's confidence in you and your message one final time.

Some presentations require the audience to reach a decision or agree to take specific action, in which case the close provides a clear wrap-up. If the audience agrees on an issue covered in the presentation, briefly review the consensus. If they don't agree, make the lack of consensus clear by saying something like "We seem to have some fundamental disagreement on this question." Then be ready to suggest a method of resolving the differences.

If you need to have the audience make a decision or agree to take action, make sure the responsibilities for doing so are clear.

If you expect any action to occur as a result of your speech, be sure to explain who is responsible for doing what. List the action items and, if possible within the time available, establish due dates and assign responsibility for each task.

Make sure your final remarks are memorable and have the right emotional tone.

Make sure your final remarks are memorable and expressed in a tone that is appropriate to the situation. If your presentation is a persuasive request for project funding, you might emphasize the importance of this project and your team's ability to complete it on schedule and within budget. Expressing confident optimism sends the message that you believe in your ability to perform. Conversely, if your purpose is to alert the audience to a problem or risk, false optimism undermines your message.

Whatever final message is appropriate, think through your closing remarks carefully before stepping in front of the audience. You don't want to wind up onstage with nothing to say but "Well, I guess that's it."

Delivering a Presentation

3 LEARNING OBJECTIVE
Discuss five steps for delivering a successful presentation.

With an outline, speaking notes, and any visual aids you plan to use, you're almost ready to deliver your presentation. This section covers five essential topics that will help you prepare for and deliver engaging and effective presentations, starting with choosing your method.

CHOOSING YOUR PRESENTATION METHOD

Speaking from thoughtfully prepared notes is the best delivery mode for nearly all presentations.

With all your materials ready, your next step is to decide which method of speaking you want to use. Speaking from notes (rather than reading from a fully written script) is nearly always the most effective and easiest delivery mode. The outline or notes guide you through the flow of the speech while giving you the freedom to speak naturally and spontaneously, to maintain eye contact with your listeners, and to respond and improvise as circumstances warrant. If you print note cards, use heavy note cards instead of regular paper. They're quieter and easier to flip through as you talk.

In contrast, attempting to recite your speech from memory is nearly always a bad idea. Under pressure, you might forget parts of the speech, and even if you can memorize the entire presentation, you will sound stiff and overly formal because you are "delivering lines" rather than talking to your audience. However, memorizing a quotation, an opening statement, or a few concluding remarks can bolster your confidence and strengthen your delivery.

Reading a prepared speech may be necessary in rare instances, such as when delivering legal information, policy statements, or other messages that must be conveyed in an exact manner. For all other business presentations, however, reading is a poor choice because it limits your interaction with the audience and lacks the fresh, dynamic feel of natural conversation.

The worst possible option is creating text-heavy slides with all your message points and then reading the slides word for word while standing in front of the audience. Doing so is agonizingly slow and tedious for the audience because people can read to themselves faster than you can read the same material out loud. If you feel the need to put your entire speech up on your slides, this is a good sign that you haven't practiced enough or don't know your material well enough.

PRACTICING YOUR DELIVERY

The more you practice, the more confidence you'll have in yourself and your material.

Practicing your presentation is essential. Practice boosts your confidence, gives you a more professional demeanor, and lets you verify the operation of your visuals and equipment. A test audience can tell you if your slides are understandable and whether your delivery is effective. A day or two before you're ready to step onstage for an important talk, make sure you and your presentation are ready:

Make sure you're comfortable with the equipment you'll be expected to use; you don't want to be fumbling with controls while the audience is watching and waiting.

- Can you present your material naturally, without reading your slides?
- Is the equipment working, and do you know how to use it?
- Could you still make a compelling and complete presentation if you experience an equipment failure and must proceed without using your slides?
- Is your timing on track? Will you be able to stay within your allotted time frame, with a few minutes to spare for questions or technical glitches?
- Can you easily pronounce all the words you plan to use?
- Have you anticipated likely questions and objections?

You'll know you've practiced enough when you can present the material at a comfortable pace and in a natural, conversational tone.

With experience, you'll get a feel for how much practice is enough in any given situation. Practicing helps keep you on track, helps you maintain a conversational tone with your audience, and boosts your confidence and composure.

PREPARING TO SPEAK

If possible, visit the speaking venue ahead of time to familiarize yourself with the facilities and the equipment.

In addition to knowing your material thoroughly and practicing your delivery, make sure your location is ready and you have everything you'll need. Whenever you can, scout the location in advance. Check the seating arrangement to confirm it's appropriate for your needs and the audience's. Verify the availability and operation of all the equipment and supplies you're counting on. If you're using slides, make sure you know how to get the file from your computer or other device to the projection system.

OVERCOMING ANXIETY

Recognize that nervousness is an indication that you care about your audience, your topic, and the occasion. These techniques will help you convert anxiety into positive energy:[16]

Preparation is the best antidote for anxiety; it gives you confidence that you know your material and that you can recover from any glitches you might encounter.

- **Acknowledge your nervousness.** Don't try to bury that feeling. In fact, remind yourself that it's not only normal but healthy to have your senses on high alert—nervousness is an indication that you care about your audience, your topic, and the occasion. Use this energy to your advantage.
- **Put yourself into a positive frame of mind before you start.** Remind yourself of how well you know the material and how much you enjoy sharing useful or inspirational information. If appropriate for the setting, smile as you take the stage.
- **Stop worrying about being perfect.** Successful speakers focus on making an authentic connection with their listeners rather than on trying to deliver a note-perfect presentation.
- **Know your material and practice until you're comfortable with it.** The more familiar you are with your material, the less panic you'll feel. And the more you rehearse, the more confident you will be.
- **Be ready with your opening line.** Have your first sentence memorized so you don't have to improvise your opening.
- **Remember to breathe.** Tension can lead people to breathe in a rapid and shallow fashion, which can create a lightheaded feeling. Breathe slowly and deeply to maintain a sense of calm and confidence.
- **Be comfortable.** Dress appropriately but as comfortably as possible. Drink plenty of water ahead of time to hydrate your voice (bring water with you, too).
- **"Make friends with the stage."** If possible, take a tip from actors and spend some time alone on the stage (or at the front of the room) before your presentation. Get comfortable with the space, figure out where you'll stand, remind yourself how satisfying it will be to share your information with the audience, and visualize a successful outcome. Remember that your audience wants you to succeed, too.
- **Take a three-second break if you need to.** If you sense that you're starting to race or ramble, pause and arrange your notes or perform some other small task while taking several deep breaths. Then start again at your normal pace.
- **Concentrate on your message and your audience, not on yourself.** When you're busy thinking about your subject and observing your audience's response, you tend to forget your fears.
- **Maintain eye contact with friendly audience members.** Eye contact not only makes you appear sincere, confident, and trustworthy but can give you positive feedback as well.
- **Keep going.** Things usually get better as you move along, with each successful minute giving you more and more confidence.

Nonverbal signals tell the audience how you're feeling, so pay attention to the signals you send.

Confident delivery starts as soon as you become the focus of attention, before you even begin to speak, so don't rush. As you approach the front of the room, walk with confidence, breathe deeply, and remind yourself that you are prepared to succeed and the audience wants to hear what you have to say. As Gina Barnett advises, your posture helps you project confidence. Stand tall, with your weight on both feet and your shoulders back. Avoid gripping the lectern or other physical structure. Use your hands to emphasize your remarks with appropriate gestures. Meanwhile, vary your facial expressions to make the message more dynamic.

No one enjoys mistakes, equipment failures, and other troubles, but they are survivable; see "Developing as a Professional: Recovering from Disasters."

Finally, think about the sound of your voice. Studies indicate that people who speak with lower pitches at a slightly faster-than-average rate are perceived as being more credible.[18] Try to sound poised and confident, varying your pitch and speaking rate to add emphasis. For instance, slow down slightly when you're making an important point.[19] Speak clearly and crisply, articulating all the syllables, and sound enthusiastic about what you're saying. Use silence instead of meaningless filler words such as *um*, *you know*, *okay*, and *like*. Silence adds dramatic punch and gives the audience time to think about your message.

DEVELOPING AS A PROFESSIONAL

Recovering from Disasters

You've researched your topic, analyzed your audience, prepared a compelling message, crafted eye-catching visuals, and practiced until you're running like a smooth machine. You're ready to go.

Then you wake up with a sore throat and half a voice. You grab a few lozenges, hope for the best, and drive to the conference facility in plenty of time to set up your equipment. Oops, somebody forgot to tell you that your presentation has been moved up by an hour, and your audience is already in the room waiting for you. You scramble to turn on your laptop and get it connected to the projector only to discover that you forgot the power cord and your battery is low. But that won't be a problem: Your laptop is dead anyway. Feeling smart, you pull out a USB flash drive with a backup copy of your PowerPoint slides and ask to use one of the several laptops you see scattered around the room. Nice idea, but you're told these are all secured, company-issued units with USB disabled. The audience is getting restless; a few people get up to leave. You keep hoping you'll wake up from this bad dream so that your great day can really start. Sorry. This *is* your day.

Ask any business speaker with a few years of experience, and you'll hear all these horror stories and a few more: people who have driven to the wrong conference center, hit themselves in the head with a microphone, tripped over wires, started with a sure-fire joke that generated nothing but cold stares, lost their train of thought mid-sentence, watched a key decision-maker in the audience fall asleep, or been rendered speechless by tough questions. Hoping you'll be spared isn't an effective response. You must be prepared for *when*—not *if*—something goes wrong.

If you assume that something *will* go wrong, you can make peace with the possibility and focus on backup planning. For technical and logistical issues, make a list of every major problem you might encounter and work out a contingency plan. For the content of your presentation, know it well enough that you can adjust on the fly, such as delivering your presentation in half the time you had planned or speaking without your slides. For performance issues, remember that you are human and so is everyone in the audience. If you lose your train of thought, have a sip of water and regroup or simply ask out loud, "Where was I?" If you can't answer a question, say, "Sorry, I don't have an answer for you right now. Can I get back to you?" If you trip getting onstage, make a joke about your upcoming appearance on *Dancing with the Stars*.

With a careful contingency plan and a dose of humility and humor, you can avoid most problems and survive the rest.[17]

CAREER APPLICATIONS

1. If you detect trouble ahead in your presentation, such as noticing that your laptop battery is about to go dead or that you somehow have an old copy of the presentation file, should you tell your audience what's wrong? Or should you try to "wing it"? Explain your answer.
2. What steps can you take to make sure you have a usable backup copy of your presentation slides outside your office? Why is this important?

HANDLING QUESTIONS RESPONSIVELY

Don't leave the question-and-answer period to chance: Anticipate likely questions and think through your answers.

Whether you take questions during a formal question-and-answer (Q&A) period or as they come up during your presentation, audience queries are often one of the most important parts of a presentation. They give you a chance to obtain important information, to emphasize your main idea and supporting points, and to build enthusiasm for your point of view. When you're speaking to high-ranking executives in your company, the Q&A period will often consume most of the time allotted for your presentation.[20]

Note that you may not always have the option of establishing ground rules for Q&A. If you're presenting to a small group of upper managers or potential investors, for example, you will probably have no say in the matter: Audience members will likely ask as many questions as they want, whenever they want, to get the information they need. On the other hand, if you are presenting to your peers or a large public audience, establish some guidelines, such as the number of questions allowed per person and the overall time limit for questions.

Don't assume you can handle whatever comes up without some preparation.[21] Learn enough about your audience members to get an idea of their concerns and think through answers to potential questions.

When people ask questions, pay attention to nonverbal signals to help determine what each person really means. Repeat the question to confirm your understanding and to ensure that the entire audience has heard it. If the question is vague or confusing, ask for clarification; then give a simple, direct answer.

If you are asked a difficult or complex question, avoid the temptation to sidestep it. Offer to meet with the questioner afterward if the issue isn't relevant to the rest of the audience or if giving an adequate answer would take too long. If you don't know the answer, don't pretend you do. Instead, offer to get a complete answer as soon as possible or ask if someone else can offer information on the topic.

If you don't have the complete answer to an important question, offer to provide it after the presentation.

Be ready for audience members who use questions to make impromptu speeches or to take control of your presentation. If the person is a customer or senior manager, you probably won't have any choice but to listen and then respond appropriately. In other situations, you might need to gently steer the person back on track, even gently interrupting to say, "I'm sorry—do you have a question?"

If you ever face hostile questions, respond honestly and directly while keeping your cool.

If a question ever puts you on the hot seat, respond honestly but keep your cool. Look the person in the eye, answer the question as well as you can, and keep your emotions under control. Defuse hostility by paraphrasing the question and asking the questioner to confirm that you've understood it correctly. Maintain a businesslike tone of voice and a pleasant expression.[22]

No matter how the presentation has gone, conclude in a strong, confident manner.

When the time allotted for your presentation is almost up or you are approaching the end of your material, prepare the audience by saying something like "We have time for one more question." After you reply to that last question, summarize the main idea of the presentation and thank people for their attention. Conclude with the same confident demeanor you've had from the beginning.

GIVING IMPROMPTU SPEECHES

Before any situation in which you might be asked to give an impromptu speech, think about the topics you might be asked about and come up with one key idea for each one.

From time to time, you may be called upon unexpectedly to give an *impromptu* or *extemporaneous* speech on the spot, without the benefit of any planning or practice. Take a few seconds to identify the one key idea you want to share with the audience. That idea alone may be enough to meet the audience's expectations, or it might be enough to get you started and allow you to piece together additional ideas on the fly. Then think about a structure that would help convey that idea. Telling a brief story can be particularly effective in these situations because the structure helps you organize what you want to say, even as you're speaking.

If you are asked to speak on a topic and simply don't have the information at hand, don't try to fake it. Instead, offer to get the information to the audience after the meeting or ask whether anyone else in the room can respond.

Finally, whenever you will be attending a function or a participating in a meeting in which you might be called on to say a few words, you can "prepare for the surprise" by thinking through what you might say.[23]

ENSURING SUCCESSFUL TEAM PRESENTATIONS

Team presentations have potential benefits for presenters and audience members, from pooling expertise and sharing the workload to offering a variety of voices and perspectives.

Teams and other work groups are occasionally called on to give presentations together. These collaborative presentations help distribute the workload, encourage diverse points of view, allow members to present information in their individual areas of expertise, and provide opportunities for everyone on the team to receive recognition from the audience. Another potential advantage is the ability to have one or more team members operating or demonstrating equipment or systems while another team member speaks to the audience.

For audiences, team presentations give the benefit of multiple viewpoints and speaking voices, which can relieve the potential tedium of listening to a single person. Having the entire team available during question-and-answer periods is a big plus, too.

Planning a Team Presentation

All team members should be involved throughout the planning and development of a presentation.

To deliver a seamless performance, team presentations require careful planning. Follow these tips:

- Outline the presentation together so that everyone has input and agrees to the flow of topics.

- Divide the presentation into manageable sections and assign each to one team member, with each person responsible for developing his or her visuals and speaking notes. Naturally, if some team members have expertise in particular topics, make sure they are assigned those parts of the presentation.
- If one team member is a particularly dynamic speaker, consider having him or her present first to launch the presentation with a good energy level.
- If you are using presentation software, finalize a template before anyone starts and make sure everyone uses it so that all the slides have a consistent look.
- Merge all the slides into a single slide deck rather than trying to switch from one file to the next during the presentation. Assign one person to edit and finalize the entire slide deck to ensure consistency and eliminate any overlaps.

Schedule more development and rehearsal time than you think you might need; team presentations require a great deal of coordination.

Importantly, schedule even more development and rehearsal time than you would with an individual presentation. Presentations almost always take longer to develop than you might think, and with the extra coordination they require, team presentations can take considerable time to get right. To be safe, schedule double the amount of development and practice time that you first think you'll need.

Rehearsing and Delivering a Team Presentation

Follow these tips for rehearsing beforehand and coordinating everyone's activities during the presentation:

Rehearse a team presentation well before the schedules date so that you can adjust timing and make other necessary changes.

- Schedule your first rehearsal at least a week before the presentation to give everyone time to adjust timing or fix other aspects that may need attention.
- Practice exactly as if you were giving the live presentation, including switching over microphones, controlling the presentation software, moving on- and offstage, and so on.
- Make sure the hand-offs from one speaker to the next are smooth and that each speaker can stay within his or her allotted time—one person running long can be a disaster in a group presentation. Don't leave anything to chance.

Map out where everyone will stand or sit during the presentation.

- Map out where everyone will stand or sit during the presentation. Don't leave anyone just hanging out on the stage while someone else is speaking. For example, arrange to have chairs set off to the side so that people can wait unobtrusively before and after their sections.
- Arrange for the first speaker to introduce the entire presentation, have each speaker introduce the next speaker, and have the final speaker present the overall conclusion to the presentation. Alternatively, you can have the first speaker take the stage again to deliver the conclusion.
- Decide how you will field questions from the audience. One good approach is to have one person, such as the first speaker, serve as team captain to take questions from the audience and direct each one to the team member best positioned to answer it.[24]
- During the presentation, make sure everyone on the team stays engaged and present. Don't mentally wander off or start checking messages on your mobile device, for example.[25] Support the person speaking and be ready with a comforting smile if the speaker makes eye contact and needs a quick boost of reassurance.

Team presentations can be the culmination of weeks or months of hard work on a project, so view them as an opportunity to celebrate your successful collaboration. Keep the attention on the audience, of course, but use the spirit of teamwork to give your presentation a lively and positive sense of energy.

Incorporating Technology in Your Presentation

4 LEARNING OBJECTIVE

Explain the growing importance of the backchannel in presentations, and list six steps for giving effective presentations online.

Like much of the rest of business communication, presentations can be high-tech affairs in many companies. Two aspects you will most likely encounter on the job are the backchannel and online presentations.

EMBRACING THE BACKCHANNEL

Many business presentations involve more than just the spoken conversation between the speaker and his or her audience. Using Twitter and other digital media, audience members often carry on their own parallel communication during a presentation via the **backchannel**, which the presentation expert Cliff Atkinson defines as "a line of communication created by people in an audience to connect with others inside or outside the room, with or without the knowledge of the speaker."[26] Chances are you've participated in an informal backchannel already, such as when texting with your classmates or live-blogging during a lecture.

Twitter and other social media are changing business presentations by making it easy for all audience members to participate in the *backchannel*.

The backchannel presents both risks and rewards for business presenters. On the negative side, for example, listeners can research your claims the instant you make them and spread the word quickly if they think your information is shaky. The backchannel also gives contrary audience members more leverage, which can cause presentations to spin out of control. On the plus side, listeners who are excited about your message can build support for it, expand on it, and spread it to a much larger audience in a matter of seconds. You can also get valuable feedback during and after presentations.[27]

By embracing the backchannel, rather than trying to fight it or ignore it, presenters can use this powerful force to their advantage. Follow these tips to make the backchannel work for you:[28]

Resist the urge to ignore or fight the backchannel; instead, learn how to use it to your advantage.

- **Integrate social media into the presentation process.** For example, you can create a website for the presentation so that people can access relevant resources during or after the presentation, create a Twitter hashtag that everyone can use when sending tweets, or display the Twitter stream during Q&A so that everyone can see the questions and comments on the backchannel.
- **Monitor and ask for feedback.** Using a free service such as TweetDeck to organize tweets by hashtag and other variables, you can monitor comments from the audience. To avoid trying to monitor the backchannel while speaking, you can schedule "Twitter breaks," during which you review comments and respond as needed.
- **Review comments to improve your presentation.** After a presentation is over, review comments on audience members' Twitter accounts and blogs to see which parts confused them, which parts excited them, and which parts seemed to have little effect (based on few or no comments).
- **Automatically tweet key points from your presentation while you speak.** Add-ons for presentation software can send out prewritten tweets as you show specific slides during a presentation. By making your key points readily available, you make it easy for listeners to retweet and comment on your presentation.
- **Establish expectations with the audience.** Explain that you welcome audience participation but that to ensure a positive experience for everyone, comments should be civil, relevant, and productive.

GIVING PRESENTATIONS ONLINE

Online presentations offer many benefits, including the opportunity to communicate with a geographically dispersed audience at a fraction of the cost of travel and the ability for a project team or an entire organization to meet at a moment's notice. This format also presents some challenges for the presenter, thanks to the layer of technology between you and your audience. Many of those "human moments" that guide and encourage you through an in-person presentation won't travel across the digital divide. For instance, it's sometimes difficult to tell whether audience members are bored or confused if your view of them is confined to small video images (and sometimes not even that). To ensure successful online presentations, keep the following advice in mind:

Online presentations give you a way to reach more people at lower cost, but they require extra preparation.

- **Keep your presentation as simple as possible.** Break complicated slides down into multiple slides if necessary, and keep the direction of your discussion clear so that no one gets lost.

MOBILE APP
With **Zoho Show** you can present from your smartphone and control presentations with a smartwatch.

- **Consider sending preview study materials ahead of time.** Doing so allows audience members to familiarize themselves with any important background information. Some presenters advise against giving out your slides ahead of time, however, because doing so gives away the ending of your presentation. If time allows, you can prepare preview materials that don't include your entire slide set.
- **Consider the viewing experience from the audience members' point of view.** Will they be able to see what you think they can see? For instance, webcast video is sometimes displayed in a small window on screen, so viewers may miss important details. People logging in on small mobile devices may not get the same visual experience as people sitting in front of full-size computer screens or conference room projectors.
- **Schedule a practice meeting if you are new to the system.** If you will be leading an online meeting on a system you have never used before, schedule a practice session beforehand with one or two colleagues so you can get used to the various controls and capabilities.
- **Make sure everyone has time to download and configure any required software.** If participants need to do anything to prepare their PCs or mobile devices, send a message well in advance of the presentation with the information they need.
- **Allow plenty of time for everyone to get connected and familiar with the screen they're viewing.** Build extra time into your schedule to ensure that everyone is connected and ready to start.
- **Ask for feedback frequently.** Except on the most advanced telepresence systems, you won't have as much of the visual feedback that alerts you when audience members are confused, and many online viewers will be reluctant to call attention to themselves by interrupting you to ask for clarification. Setting up a backchannel via Twitter or as part of your online meeting system will help in this regard.

With online presentations, you often can't rely on nonverbal signals to sense audience confusion or disagreement, so check in with your listeners frequently to see if they have questions.

Importantly, don't get lost in the technology. Use these tools whenever they'll help, but remember that the most important aspect of any presentation is getting the audience to receive, understand, and embrace your message.

For a reminder of the steps to take in developing a presentation, refer to "Checklist: Developing Presentations."

CHECKLIST ✓ Developing Presentations

A. Planning your presentation
- Analyze the situation by defining your purpose and developing an audience profile.
- Select the best medium.
- Organize your presentation by defining the main idea, limiting the scope, choosing your approach, and preparing your outline.

B. Developing your presentation
- Adapt to your audience by tailoring your style and language.
- Compose your presentation by preparing an introduction, a body, and a close.
- Use your introduction to arouse audience interest, build your credibility, and preview your message.
- Use the body to connect your ideas and hold your audience's attention.
- Close with confidence and clarity, restating your main points and describing the next steps.

C. Delivering your presentation
- Choose a presentation method, which should be speaking from an outline or notes in nearly all situations.
- Practice until you can deliver your material naturally, without reading your slides.
- Prepare to speak by verifying the operation of all the equipment you'll need to use.
- Determine whether you should use an interpreter.
- Overcome anxiety by preparing thoroughly.
- Handle questions responsively.

D. Embracing the backchannel
- Integrate social media into the presentation process.
- Monitor and ask for feedback.
- Review comments to improve your presentation.
- Automatically tweet key points from your presentation while you speak.
- Establish expectations with the audience.

E. Giving presentations online
- Consider sending preview study materials ahead of time.
- Rehearse using the system live, if possible.
- Keep your presentation as simple as possible.
- Ask for feedback frequently.
- Consider the viewing experience from the audience members' point of view.
- Allow plenty of time for everyone to get connected and familiar with the screen they're viewing.

COMMUNICATION CHALLENGES AT Barnett International

You are a communication coach at Barnett International, helping corporate clients improve their presentations using Gina Barnett's insights and strategies. In addition to presentation skills and stage presence, you also counsel clients on the content of important presentations.

INDIVIDUAL CHALLENGE: One of your clients wants to give an inspirational speech about how his grandparents founded a company during the Great Depression, built it up over four decades, and passed it on to their children, who then passed it on to him. He now serves as the CEO and wants to give his employees a sense of the company's history and values. After several attempts, however, he has given up and declared that he is simply not a storyteller. You believe he could benefit from a good example to study. Research the history of any U.S. company that has been in business for at least 50 years. (Major corporations often have helpful timelines of their history on the "About Us" pages of their websites.) Write a brief outline that would convey this company's founding story in roughly 10 minutes.

TEAM CHALLENGE: Merge the outlines you and your teammates created in the individual exercise and then develop the content for this presentation. Brainstorm your way through the introduction, the body, and the close, identifying key message points and ideas for supporting visuals. You don't have to create the visuals, but identify and describe them. Prepare a speaking outline with notes that convey all the key message points you've identified.

Key Terms

backchannel A social media conversation that takes place during a presentation in parallel with the speaker's presentation

screencasts Recordings of activity on computer displays with audio voiceover

webcasts Online presentations that people either view live or download later from the web

Summary of Learning Objectives

1 Describe the tasks involved in analyzing the situation for a presentation and organizing a presentation.

Although you rarely want to write out a presentation word for word, the three-step writing process is easy to adapt to presentations. The steps you take in planning presentations are generally the same as with any other business message: analyze the situation, gather information, select the right medium, and organize the information. The purpose of most business presentations is to inform or to persuade, although you may occasionally need to make a collaborative presentation. When you develop your audience profile, anticipate the likely emotional state of your audience members and plan to diffuse emotional situations if necessary.

Organizing a presentation requires the same general tasks as organizing a written message (define your main idea, limit your scope, select the direct or indirect approach, and outline your content), but pay special attention to the demands a presentation puts on listeners. After you complete your *planning outline*, consider simplifying it to create a *speaking outline* to guide you during your presentation.

2 Explain how to adapt to your audience and develop an effective opening, body, and close for a presentation.

To adapt to your audience, assess the size of your audience and the venue (in person or online); your subject, purpose, and budget; and the time available for preparation and allotted for your presentation. Determine whether you need to adjust your presentation or engage an interpreter when addressing audiences from other cultures, and assess the specific circumstances in which you'll be making your presentation.

You rarely write out a presentation in full, but plan your word and phrase choices so you can speak in a way that delivers planned messages in a spontaneous way. An effective introduction arouses audience interest in your topic, builds your credibility, and gives your audience a preview of your message. Previewing your message in the introduction helps the audience members recognize the importance of your material and gives them a chance to prepare for it by understanding how you plan to present it.

The bulk of your speech or presentation is devoted to a discussion of the main supporting points from your outline. Throughout the body of your talk, take care to connect your supporting points so that listeners can follow your thinking. Also work to hold your audience's attention by relating your subject to their needs, anticipating their questions, using clear and vivid language, relating your subject to familiar ideas, asking for questions or comments, and illustrating your ideas with visuals.

The close of a speech or presentation has two critical jobs to accomplish: making sure your listeners leave with the key points from your talk clear in their minds and putting your audience in the appropriate emotional state.

3 Discuss five steps for delivering a successful presentation.

First, choose the best delivery method, which is speaking naturally and spontaneously from notes or a speaking outline in nearly all instances. Second, practice until you can deliver your material naturally, without reading your slides. Third, prepare to speak by making sure that your location is ready, you have everything you'll need, and you're prepared to address audiences from other cultures, if that applies. Fourth, work to overcome anxiety before and during your presentation by letting go of worrying about being perfect, preparing more material than necessary, visualizing your success, remembering to breathe, being ready with your opening line, making yourself comfortable, taking a three-second break if you sense that you're starting to race,

concentrating on your message and your audience rather than on yourself, maintaining eye contact with friendly audience members, and going on even if you stumble. Fifth, handle questions responsively by determining whether you can set boundaries for the Q&A period, prepare answers to potential questions, pay attention to nonverbal signals, be sure to respond to all questions, don't let questioners take control of the presentation, face hostile questions head-on without getting defensive, and alert the audience when the Q&A period is almost over.

4 Explain the growing importance of the backchannel in presentations, and list six steps for giving effective presentations online. The backchannel is a parallel conversation taking place among audience members and other interested parties using Twitter and other media. To take advantage of the backchannel, you can integrate social media into your presentation, monitor and ask for feedback, review comments point by point to improve your presentation, automatically tweet key points from your presentation while you speak, and establish expectations with the audience.

To ensure a successful online presentation, keep your presentation as simple as possible, consider sending preview materials ahead of time, consider the viewing experience from the audience's side, schedule practice time on new systems, make sure everyone has downloaded necessary software, give participants time to get connected, and ask for feedback frequently.

Test Your Knowledge

To review chapter content related to each question, refer to the indicated Learning Objective.

16-1. What skills do business presentations give you the opportunity to practice and demonstrate? [LO-1]
16-2. What are the two most common purposes for giving presentations? [LO-1]
16-3. How do linear and nonlinear presentations differ? [LO-1]
16-4. How can outlines help you write and deliver a presentation? [LO-1]
16-5. What three goals should you accomplish during the introduction of a presentation? [LO-2]
16-6. How can you get and keep the audience's attention during a presentation? [LO-2]
16-7. How does the delivery method of impromptu speaking differ from the delivery method of speaking from notes? [LO-3]
16-8. As a speaker, what nonverbal signals can you send to appear more confident? [LO-3]
16-9. What can speakers do to maintain control during the question-and-answer period of a presentation? [LO-3]
16-10. What is the backchannel? [LO-4]

Apply Your Knowledge

To review chapter content related to each question, refer to the indicated Learning Objective.

16-11. You just gave an in-depth presentation on the company's new marketing programs, intended for the specialists in the marketing department. The marketing manager then asked you to give a shorter version of the presentation to the company's top executives. In general, how should you modify the scope of your presentation for this new audience? [LO-1], [LO-2]
16-12. What role can entertainment play in an effective presentation? [LO-2]
16-13. If you're worried about forgetting your key message points, should you write them out and read them during your presentation? Why or why not? [LO-3]
16-14. Can you prepare for an impromptu speech? Explain your answer. [LO-3]
16-15. Letting go of the idea that you must be perfect can reduce your anxiety before a presentation. However, is it possible to create ethical problems by being too relaxed about your message and your performance? Explain your answer. [LO-3]
16-16. What are the possible consequences of ignoring the backchannel during a presentation to a public audience (such as at a convention)? [LO-4]

Practice Your Skills

Message for Analysis

16-17. Message 16.A: Analyzing the Structure of a Presentation [LO-1] Find the transcript of a business-oriented speech or presentation by searching online for "speech transcription" or "presentation transcription." You can also browse www.americanrhetoric.com, which has thousands of transcriptions from speeches on a variety of subjects. Examine both the introduction and the close and analyze how these two sections work together to emphasize the main idea. Does the speaker want the audience to take any specific actions? To change any beliefs or feelings?

Next, identify the transitional sentences or phrases that clarify the speech's structure for the listener, especially those that help the speaker shift between supporting points. Using these transitions as clues, list the main message and supporting points, and then indicate how each transitional phrase links the current supporting point to the succeeding one. Finally, prepare a brief (two- to three-minute) presentation summarizing your analysis for your class.

Exercises

Each activity is labeled according to the primary skill or skills you will need to use. To review relevant chapter content, you can refer to the indicated Learning Objective. In some instances, supporting information will be found in another chapter, as indicated.

16-18. Presentations: Planning and Developing [LO-1], [LO-2] With a team of three other students, prepare a detailed outline (including descriptions of any visuals you would plan to use) for a 10-minute presentation on the advantages of attending your college or university. The presentation would be delivered by someone from the admissions office, and the audience would be visiting high school students and their family members. After completing the outline together, each team member should individually develop a 60-second introduction to the presentation. Meet again, have each team member present his or her introduction,

and then discuss which was most effective and why. Be prepared to discuss your conclusion with the class.

16-19. **Presentations: Developing a Presentation; Collaboration: Team Projects** [LO-2] Assume you have been invited to give an informative 10-minute talk on vacation opportunities in your home state. Outline the introduction to this talk and develop speaking notes for it. Then pair up with a classmate and analyze each other's introductions. How well do these two introductions arouse the audience's interest, build credibility, and preview the presentation? Suggest how these introductions might be improved.

16-20. **Presentations: Planning and Developing** [LO-1], [LO-2] Choose a topic from this list and prepare a brief speech or presentation (5–10 minutes), with or without visuals, as your instructor indicates.

- What I expected to learn in this course—and what I have learned
- Past public speaking experiences: the good, the bad, and the ugly
- I would be good at teaching _____.
- I am afraid of _____.
- It's easy for me to _____.
- I get angry when _____.
- I am happiest when I _____.
- People would be surprised if they knew that I _____.
- My favorite older person
- My favorite charity
- My favorite place
- My favorite sport
- My favorite store
- My favorite television show
- The town you live in suffers from a great deal of vandalism. Explain to a group of community members why juvenile recreational facilities should be built instead of a juvenile detention complex.
- You are speaking to the Humane Society. Support or oppose the use of animals for medical research purposes.
- You are talking to civic leaders of your community. Try to convince them to build an art gallery.
- You are speaking to a first-grade class at an elementary school. Explain why they should brush their teeth twice a day.
- You are speaking to a group of new drivers. Convince them of the dangers of texting while driving.
- Convince a group of senior citizens to adopt an exercise program.
- Energy issues
- Financial issues
- Government and politics
- Interesting new technologies
- Sports

16-21. **Presentations: Planning, Developing, and Delivering** [LO-1], [LO-2], [LO-3] Identify a company whose prospects look bright over the next few years because of highly competitive products, strong leadership, fundamental changes in the market, or any other significant reason. Prepare a five-minute speech, without visuals, explaining why you think this company is going to do well in the near future.

16-22. **Presentations: Mastering Delivery** [LO-3] Watch any talk that interests you at the TED website, **www.ted.com/talks**, and compare the speaker's delivery with this chapter's "Checklist: Developing Presentations." Write a brief report (one to two pages) analyzing the speaker's performance and suggesting improvements.

16-23. **Presentations: Using the Backchannel; Collaboration: Team Projects** [LO-4], **Chapter 2** In teams assigned by your instructor, develop a 15-minute slide presentation on any topic that interests you. Nominate one person to give the presentation; the others will participate via a Twitter backchannel. Set up private Twitter accounts if your class doesn't already use them, and create a hashtag that everyone on the team can follow using TweetDeck or a similar tool. During the presentation, the audience members should tweet comments and questions, and the presenter can take a Twitter break partway through to respond to backchannel messages. Be ready to discuss your experience with the entire class.

Expand Your Skills

Critique the Professionals

Find a product demonstration video on YouTube for any product that is appropriate to discuss in class. (Find a video that is at least two minutes long and was uploaded by the company that makes the product, not by a customer or other outside party.) Study the effectiveness of the demonstration, including the use of visuals and the presenter's speech and mannerisms. Did you find the demonstration compelling? Why or why not? If not, what would have made it more compelling? Using whatever medium your instructor requests, write a brief summary of your analysis. Be sure to include a link to the video.

Sharpening Your Career Skills Online

Find a website, video, article, podcast, or presentation that offers advice on public speaking or presentations in business. Write a brief email message to your instructor, describing the item that you found and summarizing the career skills information you learned from it.

Build Your Career

As Chapter 18 notes, if you don't have a long history in the profession you plan to pursue after graduation, education is probably the strongest selling point on your résumé. Plan to present your educational background in depth, choosing facts that support your professional theme. This is a good time to review the classes you've taken and decide which ones to highlight as relevant support points. If your major doesn't align precisely with the jobs you want to pursue, think about which aspects of your education do align and how you can highlight those elements.

Five-Minute Guide to Planning Presentations

Before you start to work on your next major presentation, review these helpful tips.

00:01

Plan the presentation

1. Leave yourself enough time! High-quality presentations can take days to create and rehearse.
2. Learn as much as you can about the setting and circumstances of your presentation, from the audience's expectations to the seating arrangements.
3. Make sure you can express your goal for the presentation in a single sentence.
4. Decide whether your goal would be best met with a *linear* (following an outline) or a *nonlinear* (zooming in and out and moving around from topic to topic) presentation.
5. Consider preparing a detailed planning outline and a simpler speaking outline that can serve as your notes.

00:02

Develop the presentation

1. Remember to adapt your content, materials, and speaking style to the situation and the audience.
2. Develop your presentation content:
   - The *introduction* needs to get the audience's attention and interest, establish your credibility, and preview your message.
   - The *body* needs to lay out your ideas and information—with smooth transitions from section to section—and maintain the audience's interest.
   - The *close* should restate your main points and summarize any action items; be sure you can end with clarity and confidence.

00:03

Design and create your visuals

1. Remember that your slides are *not* your presentation; you and what you have to say are. Slides and other visual aids are only there to support your spoken message.
2. *Structured slides* (usually based on templates):
   - Are easy to create (just pick a template and start typing)
   - Are a practical choice for routine presentations such as project updates
   - Can be mind-numbing if you have slide after slide of bullet points and text blocks
3. *Free-form slides* (no fixed design from slide to slide, usually with lots of visuals and very little text):
   - Can create a more engaging and dynamic experience for you and the audience
   - Are usually more creatively demanding and time-consuming to create
   - Put more burden on you, the speaker, because you can't rely on displayed text
4. General design tips:
   - Design each slide around a *key visual* when you can to unify the points you are making.
   - Limit the number of words on any slide, and make sure everyone in the room can read them.
   - Use color strategically to direct and focus the audience's gaze.
   - Simple is always better—with backgrounds, artwork, animation, transitions, and builds.

00:04

Complete your materials and practice your delivery

1. Create additional slides to help the audience follow the flow: title slide, agenda slide, and navigation slides that show where you are in the presentation.
2. Create effective handouts that work in concert with your presentation.
3. Leave plenty of time to practice until you are comfortable with the material and your equipment.

00:05

Be ready to present with confidence

1. Take steps to overcome anxiety: use your nervousness as positive energy, don't worry about being perfect, know your material, be ready with an opening line, remember to breathe, make friends with the stage, and concentrate on your message and your audience, not on yourself.
2. Anticipate likely questions and be ready with answers.

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17 Enhancing Presentations with Slides and Other Visuals

LEARNING OBJECTIVES

After studying this chapter, you will be able to

1. Explain the role of visuals in business presentations, and list the types of visuals commonly used.
2. Explain the difference between structured and free-form slides, and suggest when each design strategy is more appropriate.
3. Outline the decisions involved in using a key visual and selecting color, artwork, and typefaces to create effective slide designs.
4. Explain how to create effective slide content.
5. Explain the role of navigation slides, support slides, and handouts.



Duarte, Inc.

Follow Nancy Duarte's slide design principles to create compelling, audience-focused visuals for your presentations.

COMMUNICATION CLOSE-UP AT Duarte

www.duarte.com

When managers of top consumer brands, global experts in a wide variety of topics, and campaigners for major social causes need help getting their messages across, many of them turn to the services of Duarte, a Silicon Valley firm that specializes in presentation design. You don't have to be a major corporation or well-known speaker to benefit from Duarte's expertise, however. In her books and presentations, CEO and founder Nancy Duarte offers advice that all business communicators can use to create more compelling presentation slides.

Duarte suggests five principles of effective slide design that echo the audience-centered approach you've been practicing throughout this course. The first and most important is to make your presentation about your audience and their needs. If you are pitching a new business idea to potential investors, for example, do it in a way that addresses their interests in finding profitable investment opportunities. In other words, don't make it all about you and how clever you are. Use slides and other visuals to show audience members how they can make money by climbing on board with you.

Second, don't try to transfer truckloads of data and information to your audience. Instead, focus on sharing meaning and connecting with audiences at an emotional level. If you're training your sales force on a new product, give them the technical details and market information, but also fire them up with stories about how people can use this product to improve their lives or do amazing things in their businesses. Use images and video to convey the human side of whatever business proposition you're discussing. And with every slide or visual, strive for simplicity. Overloaded slides exhaust and confuse audiences.

Third, use your visual medium to full effect. This might sound obvious, since presentation slides are a visual medium to begin with, but too many presenters rely too heavily on verbal content. Showing your audience one slide after another with nothing but words on them is not far removed from handing them a written report. In addition, when it comes to learning and understanding, many people respond better to visual content and representations of ideas. For each major point in your presentation, see if you can find a way to present the key information visually—through a flowchart, a diagram, a photo, a mind map, or any other visual tool. PowerPoint and other slide programs offer a host of easy-to-use drawings that help you present ideas and information.

Fourth, think *design*, not *decoration*, when it comes to creating your slides. When choosing fonts, colors, artwork, animation, and other visual elements, consider how each piece can support the meaning you want your audience to receive. Don't add things to your slides to "liven them up" or because you stumbled on a cool-looking special effect in your slide software—some of these add little or no value while distracting the audience from your message.

Fifth, remember that slides and other visuals are simply part of the channel between you and your audience. Because slides are so visible, it's easy for presenters to fall into the trap of treating their slides as the centerpiece of a presentation. But slides are just a conduit for moving ideas, meaning, and inspiration from your mind to your audience's minds. By following some time-tested principles of good design, you can create slides that help you make those important connections with every audience.[1]

Planning Your Presentation Visuals

1 LEARNING OBJECTIVE
Explain the role of visuals in business presentations, and list the types of visuals commonly used.

The three-step development process in Chapter 16 helps ensure that you have a well-crafted, audience-focused message. The techniques in this chapter, which reflect the advice offered by experts such as Nancy Duarte (profiled in the chapter-opening Communication Close-Up), will help you enhance the delivery of that message with creative and effective visuals.

Visuals can improve the quality and impact of any presentation by creating interest, illustrating points that are difficult to explain with words alone, adding variety, and increasing the audience's ability to absorb and remember information. Behavioral research has shown that visuals can improve learning because humans process visuals much faster than they process text.[2]

Remember that the purpose of presentation visuals is to support your spoken message, not replace it.

For all the communication power of visuals, however, don't make the mistake of thinking that your visuals *are* your presentation. Particularly when using software such as Prezi or Microsoft PowerPoint, communicators sometimes fall into the trap of letting the visuals take center stage. Remember that your message is the presentation, not your visuals; your visuals are there to help support and clarify what you have to say.[3]

SELECTING THE TYPE OF VISUALS TO USE

You can select from a variety of visuals to enhance presentations, each with unique advantages and disadvantages:

Presentation slides and Prezis are the most common visual supports for presentations, but don't limit yourself to these.

- **Prezis.** Chapter 16 discusses the differences between linear and nonlinear presentations, with Prezis as the dominant example of nonlinear presentations. The biggest advantages of Prezis are flexibility (both in how you structure your visuals and in how you access them during your presentation), the ability to incorporate video and other media elements, and a more dynamic look and feel than conventional slide shows. The potential disadvantages of Prezis include the chance of viewers "losing the plot" as the presenter jumps from topic to topic and the possibility of viewers feeling dizzy or even getting motion sickness if zooming is overused.[4]
- **Slides.** Slides created with PowerPoint or similar programs have a number of advantages: They are easy to create and edit (at least for simple slides), designs are easy to customize, and slides are easy to incorporate into online meetings and webcasts. The biggest potential disadvantage of slides is the linear nature of the presentation. Changing the flow of the presentation or jumping to specific slides is typically more difficult with conventional slides than it is with a Prezi. Note that for both Prezis and slides, the disadvantages people sometimes mention are usually a result of how the tools are used rather than limitations in the software itself.
- **Overhead transparencies.** Overhead transparencies are the very definition of old school, but they do have advantages. They can be created with nothing more than a marking pen, you can write on them during a presentation, and they never malfunction. On the downside, they're limited to static displays, they're virtually impossible to edit once you've printed them, you need to have the right equipment, and you or a partner must stand next to the projector throughout the entire presentation.

MOBILE APP
With the **Google Slides** app, you can create, practice, and deliver presentations on your mobile devices.

- **Chalkboards and whiteboards.** Chalkboards and whiteboards are effective tools for recording points made during small-group sessions. With digital whiteboards, you can print, save, and share copies of whatever is written, too.
- **Flip charts.** Flip charts are another dependable low-tech tool for meetings and presentations. They are great for recording comments and questions during a presentation or for creating a "group memory" during brainstorming sessions, keeping track of all the ideas the team generates.
- **Other visuals.** Be creative when choosing visuals to support your presentation. A video of a consumer focus group talking about your company can have much more impact than a series of text slides that summarize what the group said. In technical or scientific presentations, a sample of a product or material lets your audience experience your subject directly. Designers and architects use mock-ups and models to help people envision what a final creation will look like. You might also want to incorporate other software into your presentation, such as a live spreadsheet to show financial data or a computer-aided design program to show a new product's design.

This chapter focuses on slide presentations, although most of these design tips apply to other visuals as well.

VERIFYING YOUR DESIGN PLANS

Think through your presentation outline carefully before designing your visuals.

After you have chosen the medium or media for your visuals, think through your presentation plan carefully before you start creating anything. Discerning audience members—the sort of people who can influence the direction of your career—are not easily fooled by visual razzle-dazzle. If your analysis is shaky or your conclusions are suspect, a fancy visual production won't help your presentation succeed. Review the plan for each visual and ask yourself how it will help your audience understand and appreciate your message.

Next, make sure your presentation style is appropriate for the subject matter, the audience, and the setting (see Figure 17.1 on the next page). Take the time to double-check any cultural assumptions that might be inappropriate. Are you highlighting with a color that has negative emotional connotations in your audience's culture? Would your materials be too playful for a serious audience? Too serious for an audience that values creativity?

When it comes time to make design choices, from selecting fonts to deciding whether to include a photo, simplicity should always be your guide. Doing so has several advantages. First, creating simple materials often takes less time. Second, simple visuals reduce the chances of distraction and misinterpretation. Third, the more complex your presentation, the more likely something might go wrong.

Finally, use your time wisely. Presentation software seems to encourage experimentation and fiddling around with details and special effects, which can eat up hours of time you probably won't have. Based on your audience and the situation, decide up front how much visual design is sufficient for your purpose and then stop when you get there. Use the time you'll save to rehearse your presentation—practice is far more important than minor design issues on your slides.

Choosing Structured or Free-Form Slides

2 LEARNING OBJECTIVE
Explain the difference between structured and free-form slides, and suggest when each design strategy is more appropriate.

For linear presentations, the most important design choice you face when creating slides is whether to use conventional **structured slides** or the looser, **free-form slides** that many presentation specialists advocate. Compare the two rows of slides in Figure 17.2 on page 495. The structured slides in the top row follow the same basic format throughout the presentation; in fact, they're based directly on the templates built into PowerPoint, which tend to feature lots of bullet points.

Structured slides are usually based on templates that give all the slides in a presentation the same general look; *free-form* slides typically don't follow any set design plan but are unified by color and other elements.

The free-form slides in the bottom row don't follow a rigid structure. However, choosing a free-form design strategy does not mean you should just randomly change the design from one slide to the next. Effectively designed slides should still be unified by design elements such as color and typeface selections, as Figures 17.2c and 17.2d show.



Figure 17.1 Presentation Style
Presentation software lets you create a variety of visual styles, from quiet and plain to bold and busy. These four slides contain the same text but send different nonverbal messages. Make sure you choose a style that is appropriate for your audience and your message.

Even though they are not structured, free-form slides (and Prezi presentations) still need to be unified via color, typeface, and other design choices.

Also, note how Figure 17.2d combines visual and textual messages to convey the point about listening without criticizing. This complementary approach of pictures and words is a highlight of free-form design.

ADVANTAGES AND DISADVANTAGES OF STRUCTURED SLIDES

Structured slides have the advantage of being easy to create; you simply choose an overall design scheme for the presentation, select a template for a new slide, and start typing. If you're in a schedule crunch, going the structured route might save the day because at least you'll have *something* ready to show. Given the speed and ease of creating them, structured slides can be a more practical choice for routine presentations such as project status updates.

Structured slides are usually the best choice for project updates and other routine information presentations, particularly if the slides are intended to be used only once.

Also, because more information can usually be packed onto each slide, carefully designed structured slides can be more effective at conveying complex ideas or sets of interrelated data to the right audiences. For example, if you are talking to a group of executives who must decide where to make budget cuts across the company's eight divisions, at some point in the presentation they will probably want to see summary data for all eight divisions on a single slide for easy comparison. Such a slide would be overcrowded by the usual definition, but this might be the only practical way to get a "big picture" view of the situation. (The best solution is probably some high-level, summary slides supported by a detailed handout, as "Creating Effective Handouts" on page 506 explains.)

Structured slide designs with too much text can be tiresome and overwhelming to the audience.

The primary disadvantage of structured design is the mind-numbing effect of text-heavy slides that all look alike. Slide after slide of dense, highly structured bullet points with no visual relief can put an audience to sleep.

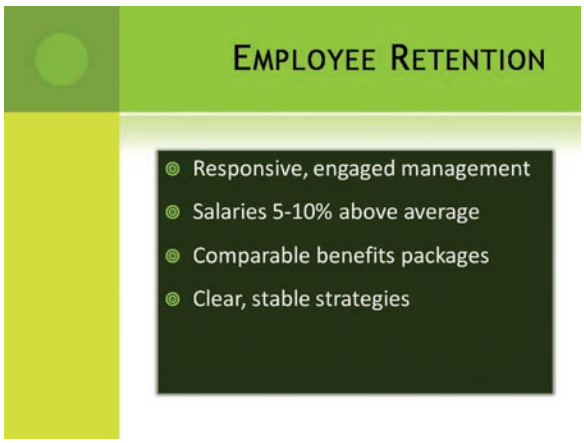


Figure 17.2a



Figure 17.2b



Photo credit: ESB Basic/Shutterstock

Figure 17.2c

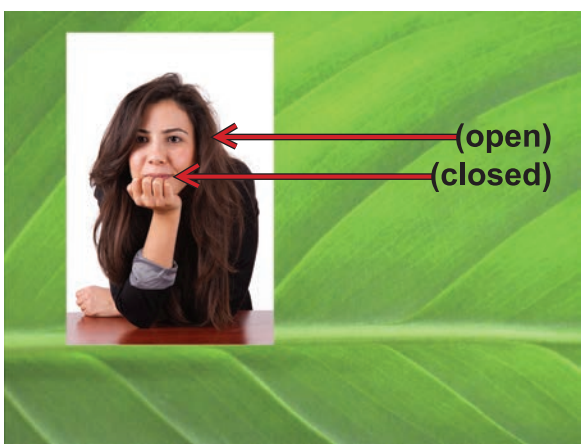


Photo credit: NiglayNik/Shutterstock

Figure 17.2d

Figure 17.2 Structured Versus Free-Form Slide Design
Compare the rigid, predictable design of the two slides in the top row with the free-form designs in the bottom row. Although the two free-form slides don't follow the same design structure, they are visually linked by color and font choices. As you compare these two styles, you can imagine how the free-form designs will require more slides to cover the same subject and require the speaker to convey more of the message. (Note that Figure 17.2d is a lighthearted but effective way of conveying the first bullet point in Figure 17.2b.)

ADVANTAGES AND DISADVANTAGES OF FREE-FORM SLIDES

Free-form slide designs can overcome the drawbacks of text-heavy structured design by providing complementary visual and textual information and limiting the amount of information delivered on each slide. (Of course, well-designed structured slides can also meet these criteria, but the constraints of prebuilt templates make doing so more of a challenge.)

With appropriate imagery and thoughtful design, free-form designs can also create a more dynamic and engaging experience for the audience. Given their ability to excite and engage, free-form designs are particularly good for motivational, educational, and persuasive presentations—particularly when the slides will be used multiple times and therefore compensate for the extra time and effort required to create them. By taking advantage of the animation capabilities in PowerPoint or Keynote, it is also possible to create some of the dynamic, flowing feel of a Prezi presentation.

With appropriate imagery and thoughtful design, free-form designs can create a more dynamic and engaging experience for the audience.

Free-form slides have several potential disadvantages, however. First, effectively designing slides with both visual and textual elements is more creatively demanding and more time-consuming than simply typing text into preformatted templates. The emphasis on visual content also requires more images, which take time to find.

A key disadvantage of free-form slide designs is the time and effort that can be required to create effective presentations without the built-in structure of slide templates.

Second, because far less textual information tends to be displayed on-screen, the speaker is responsible for conveying more of the content. Ideally, of course, this is how

a presentation *should* work, but presenters sometimes find themselves in less-than-ideal circumstances, such as being asked on short notice to give a presentation that someone created.

Third, if not handled carefully, the division of information into smaller chunks can make it difficult to present complex subjects in a cohesive, integrated manner. For instance, if you're discussing a business problem that has five interrelated causes, it might be helpful to insert a conventional bullet-point slide as a summary and reminder after discussing each problem on its own.

Designing Effective Slides

3 LEARNING OBJECTIVE
Outline the decisions involved in using a key visual and selecting color, artwork, and typefaces to create effective slide designs.

"Death by PowerPoint" is a common complaint; however, the problem isn't with the tools but how they are used.

Businesspeople have had to sit through so many poorly conceived presentations that you may hear the phrase "death by PowerPoint" to describe the agony of sitting through dull, slide-heavy presentations. However, the problem is not with PowerPoint itself (or with Apple Keynote or any other presentation program). The software is just a tool and, like other tools, can be used well or poorly. Unfortunately, lack of design awareness, inadequate training, schedule pressures, and the instinctive response of doing things the way they've always been done can lead to ineffective slides and lost opportunities to really connect with audiences. And although Prezi is sometimes promoted as the antidote to PowerPoint, using Prezi does not guarantee you'll end up with an effective presentation; it, too, can be misused and wind up creating a barrier between the speaker and the audience.

This section offers helpful tips for creating slides that engage audiences without overwhelming them with too much information or poorly designed layouts.

DESIGNING SLIDES AROUND A KEY VISUAL

Organizing a slide around a key visual can help the audience quickly grasp how ideas are related.

With both structured and free-form design strategies, it is often helpful to structure some of the slides around key visuals that help organize and explain the points you are trying to make. For example, a pyramid suggests a hierarchical relationship, while a circular flow diagram emphasizes that the final stage in a process loops back to the beginning of the process. Figure 17.3 shows six of the many types of visual designs you can use to organize information on a slide. Prezi presentations are often built around a central visual as well.

Not every slide in a presentation lends itself to using a key visual, but consider using them whenever a visual can help organize and communicate your ideas.

SELECTING DESIGN ELEMENTS

To design effective slides, remember the six principles of effective design: consistency, contrast, balance, emphasis, convention, and simplicity (review Chapter 9 for a refresher).

As you design and create slides, always keep the audience's experience in mind: What will it be like to view this slide while listening to a speaker? Chapter 9 highlights six principles of effective design: consistency, contrast, balance, emphasis, convention, and simplicity. Pay close attention to these principles as you select the design elements for your slides (covered in this section) and create content for each slide (covered in the following section).

Color

Color is much more than mere decoration:
- It provides emphasis, contrast, and isolation.
- It increases readability and retention.
- It sends powerful nonverbal signals.
- It can stimulate desired emotional responses.

Color is a critical design element, far more than mere decoration. It grabs the viewer's attention, emphasizes important ideas, creates contrast, and isolates slide elements. Color sends a powerful nonverbal message, too, whether it's elegance, technical sophistication, fiscal prudence, or trendiness. You can study this effect as you view various websites or advertisements, for instance. Even if the words are the same, a palette of cool grays and blues "says" something different from a palette of warm oranges and browns or a palette of hot pink and lime green.

Your color choices can also stimulate various emotions, as Table 17.1 suggests. For instance, if you want to excite your audience, add warm colors, such as red and orange,

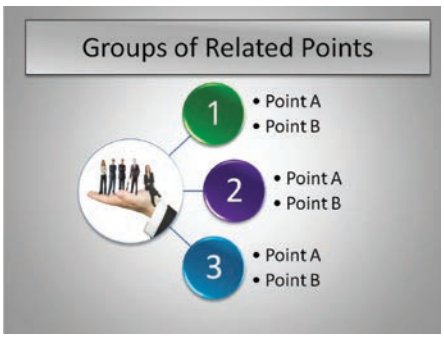


Figure 17.3a

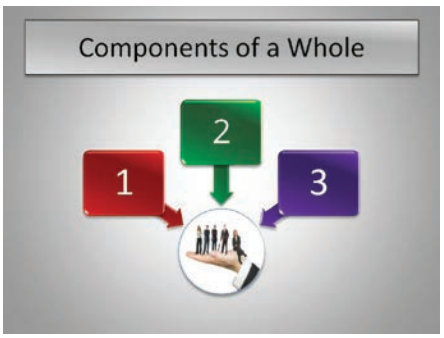


Figure 17.3b

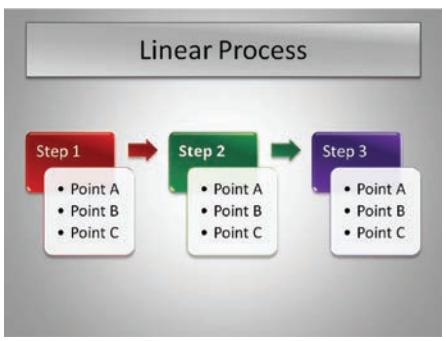


Figure 17.3c

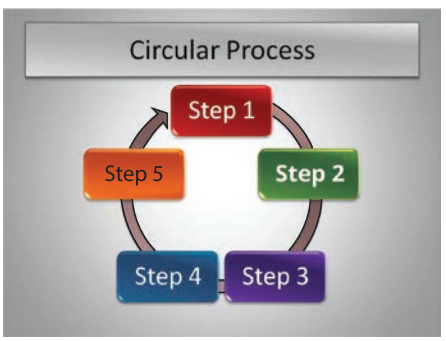


Figure 17.3d

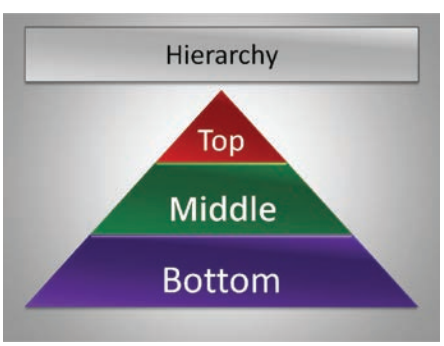


Figure 17.3e

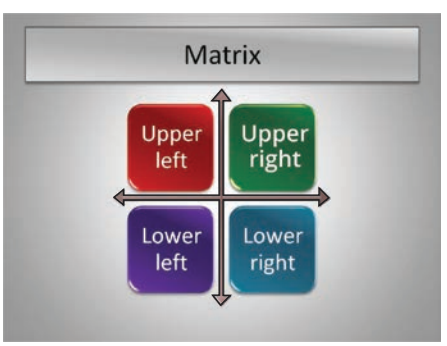


Figure 17.3f

Photo credit: ESB Basic/Shutterstock

Figure 17.3 Using a Key Visual to Organize Points on a Slide
Simple graphical elements such as these "SmartArt" images in Microsoft PowerPoint make it easy to organize slide content using a key visual. Whether you're trying to convey the relationship of ideas in a hierarchy, a linear process, a circular process, or just about any other configuration, a key visual can work in tandem with your written and spoken messages to help audiences get your message.

TABLE 17.1 Color and Emotion

Color	Emotional Associations (for U.S. audiences)	Potential Uses
Blue	Peaceful, soothing, tranquil, cool, trusting	Background for presentations (usually dark blue); a safe and conservative choice
White	Neutral, innocent, pure, wise, simple	Good choice for text displayed on a dark background
Yellow	Warm, bright, cheerful, enthusiastic	Primarily as a highlight color, such as text bullets and subheadings with a dark background
Red	Passionate, dangerous, active, painful	For promoting action or stimulating the audience; seldom used as a background ("in the red" specifically refers to financial losses)
Green	Assertive, prosperous, envious, relaxed, natural	Highlight and accent color (note that green symbolizes money in the United States but not in other countries)
Orange	Warm, dramatic	Useful to suggest energy and action
Gray	Dignified, serious, somber, practical	Providing a visually "quiet" background, enhancing contrast with brighter colors
Black	Serious, technical, formal	As either a functional or artistic color, depending on overall slide style

Source: Based in part on "Choosing Colors for Your Presentation Slides," Think Outside the Slide, accessed 15 May 2017, www.thinkoutsidetheslide.com; Claudyne Wilder and David Fine, *Point, Click & Wow* (San Francisco: Jossey-Bass Pfeiffer, 1996), 63, 527.

to your slides. Lastly, keep in mind that colors can have specific meanings in various cultures, so if you are creating slides for intercultural or international audiences, research those cultural differences.

When selecting color, limit your choices to a few compatible ones and keep in mind that some colors work better together than others. Contrasting colors, for example, increase readability, so when selecting colors for backgrounds, titles, and text, avoid choosing those that are close in hue, such as brown on green or blue on purple.[5] If you'll be presenting in a dark room, use dark colors such as blue for the background, a midrange of brightness for illustrations, and light colors for text. If you are presenting in well-lit rooms, reverse the colors: Use light colors for the background and dark colors for text. If you have some reason to change colors between slides, don't switch back and forth from very dark to very bright; the effect is jarring to the audience's eyes.[6]

Artwork

Every slide has two layers or levels of visual elements: the background and foreground. The *background* is the equivalent of paper in a printed report and often stays the same from slide to slide, particularly with structured designs. The *foreground* contains the unique text and graphic elements that make up each individual slide.

The background should stay in the background, not compete with the foreground.

In general, the less the background does, the better. As Nancy Duarte explains, the background "should be open, spacious, and simple."[7] Cluttered or flashy backgrounds tend to distract from your message. The background needs to stay in the background; it shouldn't compete with the foreground elements. Bear in mind that you don't *need* to use a background at all, other than perhaps a solid color to set type and images against.

Artwork can be either decorative or functional; use decorative artwork only if it supports the message of the slide in question.

In the background, all artwork is essentially decorative. In the foreground, artwork can be either functional or decorative. *Functional artwork* includes photos, technical drawings, charts, and other visual elements containing information that is part of your message. In contrast, *decorative artwork* doesn't deliver textual or numerical information, and it may or may not be helpful. Decorative artwork can be helpful if it establishes an appropriate emotional tone or amplifies the message of a slide, in part because simple, high-impact images are easier to remember than text.[8] Decorative artwork is unhelpful if it doesn't add value, is off topic, conveys an unprofessional image, or pulls viewer attention away from the essential elements on a slide. *Clip art*, collections of drawings you can insert in slides and other documents, is probably the biggest troublemaker of them all. You can find thousands of pieces of free clip art in presentation software or online, but few of them have any information value, and many give your slides an unprofessional, cartoony appearance.

Typefaces and Type Styles

When selecting typefaces and type styles for slides, follow these guidelines:

Emphasize clarity and simplicity in your typeface and type style choices.

- Avoid script or decorative typefaces, except for limited, special uses.
- Use serif typefaces with care and only with larger text.
- Limit the number of typefaces to one or two per slide.
- When using thinner typefaces, use boldface so that letters don't disappear on-screen.
- Avoid most italicized type; it is usually difficult to read when projected.
- Avoid all-capitalized words and phrases.
- Allow extra white space between lines of text.
- Be consistent with typefaces, type styles, colors, and sizes.

When selecting type sizes, consider the room(s) in which you'll be presenting. The farther the audience is from the screen, the larger your type must be in order to be readable from everywhere in the room. The investor and author Guy Kawasaki, who has sat through hundreds and hundreds of presentations, suggests using no type smaller than 30 points. Doing so not only ensures readable slides but forces you to distill every idea down to its essential core, simply because you won't have space to be wordy.[9]

After you have selected your fonts and type styles, test them for readability by viewing sample slides from your audience's viewing location. If you don't have access to the meeting room, a clever way to test readability at your computer is to stand back as many feet from the screen as your screen size in inches (17 feet for a 17-inch screen, for example). If the slides are readable at this distance, you're probably in good shape.[10]

A simple test for text readability: Stand back as many feet from your computer as your screen is in inches; if you can read the text easily, it should be big enough for your slides.

MAINTAINING DESIGN CONSISTENCY

Audiences start assigning meaning to visual elements as soon as they see your first on-screen image. For instance, if yellow is used to call attention to the first major point in your presentation, viewers will expect the next occurrence of yellow to also signal an important point. Don't force people to repeatedly figure out the meaning of design elements by making arbitrary changes from slide to slide.

Design inconsistencies confuse and annoy audiences; don't reassign colors and make other random design changes throughout your presentation.

Fortunately, presentation software makes consistency easy to achieve, particularly for structured slide designs. You simply adjust the *slide master* (or equivalent function in your software) using the colors, fonts, and other design elements you've chosen. These choices will then automatically show up on every slide in the presentation.

Take advantage of the slide master or other template capability in your software to help ensure consistency.

In addition, you can maintain consistency by choosing a predefined layout from those available in your software—which helps ensure that bulleted lists, charts, graphics, and other elements show up in predictable places on each slide. Something as simple as switching from a single column of bullet points to two columns can cause problems for readers as they try to figure out the meaning of the new arrangement. The less work readers must do to interpret your slide designs, the more attention they can give to your message.

Creating Effective Slide Content

With some design fundamentals in mind, you're ready to create the content for your slides. For every slide, remember to watch out for information overload. When slides have too much content—textual, visual, or both—particularly for several slides in a row, viewers can't process the incoming information fast enough to make sense of it and eventually tune out. Keep your slides clear and easy to grasp, and pace the flow of information at a speed that lets people connect your ideas from one slide to the next.[11]

4 LEARNING OBJECTIVE
Explain how to create effective slide content.

WRITING READABLE CONTENT

One of the most common mistakes beginners make—and one of the chief criticisms leveled at structured slide designs in general—is stuffing slides with too much text. Doing so overloads the audience with too much information too fast, takes attention away from the speaker by forcing people to read more, and requires the presenter to use smaller type.

Use a minimal amount of text on your slides and only to emphasize key points, not to convey your entire message.

Effective text slides supplement your words and help the audience follow the flow of ideas. In a sense, slide text serves as the headings and subheadings for your presentation. Accordingly, choose words and short phrases that help your audience follow the flow of ideas, without forcing them to read in depth. You want your audience to *listen*, not to *read*. Use your slides to highlight key points, summarize and preview your message, signal major shifts in thought, illustrate concepts, or help create interest in your spoken message. If the audience can benefit from additional written information, provide those details in handouts.

When writing content for text slides, keep your message short and simple (see Figure 17.4 on the next page):

- Limit each slide to one thought, concept, or idea (without dividing things so far that the audience has trouble seeing the big picture).
- Limit text content to four or five lines with four or five words per line. For selected slides, it might make sense to exceed these limits, but do so infrequently.

You can limit the amount of text on each slide by limiting each slide to a single thought, concept, or idea.

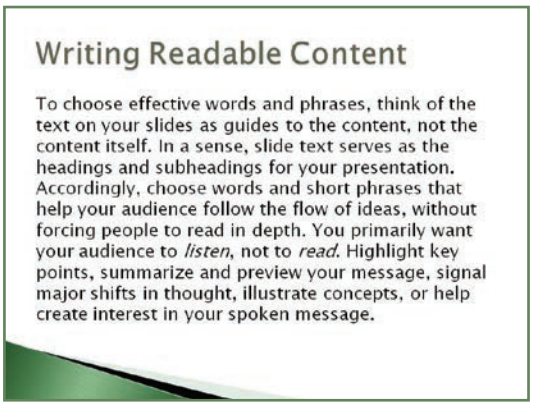


Figure 17.4a

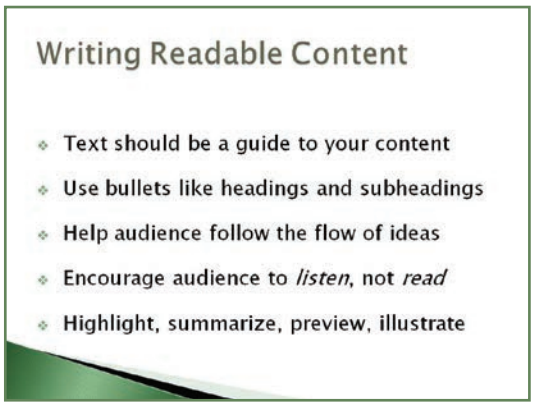


Figure 17.4b

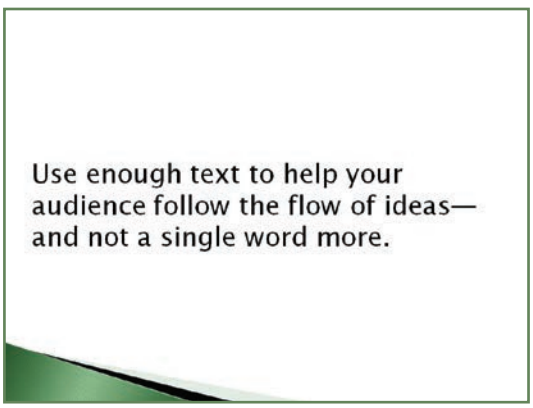


Figure 17.4c

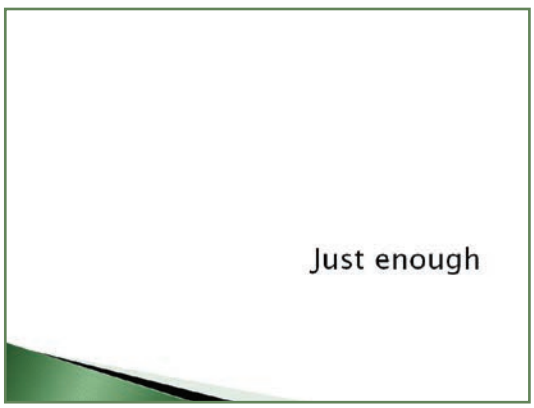


Figure 17.4d

Figure 17.4 Writing Text for Slides
Effective text slides are clear, simple guides that help the audience understand and remember the speaker's message. Notice the progression toward simplicity in these slides: Figure 17.4a is a paragraph that would distract the audience for an extended period. Figure 17.4b offers concise, readable bullets, although too many slides in a row in this structured design would become tedious. Figure 17.4c distills the message down to a single thought that is complete on its own but doesn't convey all the information from the original and would need embellishment from the speaker. Figure 17.4d pushes this to the extreme, with only the core piece of the message to serve as an "exclamation point" for the spoken message. Figure 17.4c and especially Figure 17.4d could be more even more powerful with a well-chosen visual that illustrates the idea of following the flow.

- Don't show a large number of text-heavy slides in a row; give the audience some visual relief.
- Write short, bulleted phrases rather than long sentences.
- Use sentences only when you need to share a quotation or some other text item verbatim.[12]
- Phrase list items in parallel grammatical form to facilitate quick reading.
- Use the active voice.
- Include short, informative titles.
- When combining visuals with text, the more information the visual can convey, the less work your text needs to do.

CREATING CHARTS AND TABLES FOR SLIDES

Many graphics that work well in printed form need to be simplified for use in presentations.

Charts and tables for presentations need to be simpler than visuals for printed documents. Detailed images that look fine on the printed page can be too dense and too complicated for presentations. Remember that your audience will view your slides from across the room—not from a foot or two away, as you do while you create them. Don't force the audience to study your charts and graphs to get the message. Follow these guidelines:

- **Reduce the detail.** Eliminate anything that is not essential to the message. If necessary, break information into more than one slide. If a deeper level of detail is helpful or necessary, hand out printed visuals that people can review during or after the presentation.
- **Simplify.** For example, if a bar chart is segmented by week, don't write "Week of 12/01," "Week of 12/08," and so on. Use the "Week of" label once and then just include the dates. Similarly, you might be able to remove the vertical scale from the left side of the chart and just show individual values above each bar.[13]
- **Shorten numbers.** If doing so doesn't hide essential details, you can round off numbers such as $12,500.72 to $12 or $12.5 and then label the axis to indicate thousands.
- **Limit the amount of data shown.** Line charts look busy when they have more than two or three lines, bar charts look crowded with more than five or six bars, and tables are difficult to read if they have too many rows or columns.
- **Highlight key points.** Use arrows, boldface type, and color to direct your audience's eyes to the main point of a visual. Summarize the intent of the graphic in one clear title, such as "Earnings up by 15%."
- **Adjust the size and design.** Modify the size of a graphic to accommodate the size of a slide. Leave plenty of white space so that audience members can view and interpret content from a distance. Use colors that stand out from the slide's background and choose a typeface for labels that is clear and easy to read.

ADDING ANIMATION AND MULTIMEDIA

Today's presentation software offers a wide array of options for livening up your slides, including sound, animation, video clips, transition effects, and hyperlinks to websites and other resources. As with every other visual element, the key is to make sure any effects you use support your message. Always consider the impact that all these effects will have on your audience members and their desire to understand your message.[14]

Animation and special effects can be grouped into four categories: functional animation, transitions and builds, hyperlinks, and multimedia. These capabilities are briefly discussed in the following sections; to learn more about using them, consult the Help information for your software.

Functional Animation

Although you can animate just about everything in a presentation, resist the temptation to do so. Make sure each animation has a purpose.

Presentation software offers many options for livening up your slides, including sound, animation, video clips, transition effects, hyperlinks, and zooming. These special effects need to be used sparingly and always with a focus on helping viewers grasp your message.

Functional animation involves motion that is directly related to your message, such as a highlight arrow that moves around the screen to emphasize specific points in a technical diagram. Such animation is also a great way to demonstrate sequences and procedures. You can control every aspect of the animation, so it's easy to coordinate the movement with the points you're making in your presentation.

In contrast, *decorative animation*, such as having a block of text cartwheel in from off-screen or using the zooming and panning capabilities in Prezi in ways that don't enhance audience understanding, needs to be incorporated with great care. These effects don't add any functional value, and they easily distract audiences.

Using carefully controlled functional animation is also a great way to demonstrate sequences and procedures. For a training session on machinery repair, for example, you can show a schematic diagram of the machinery and walk your audience through each step of the troubleshooting process, highlighting each step on-screen as you address it verbally. Again, use animation in support of your message, not simply for animation's sake.

Transitions and Builds

Slide transitions control how one slide replaces another on-screen; choose subtle transitions to ease the viewer from one slide to the next.

In addition to animating specific elements on your slides, you can choose from various options for adding motion between slides. These **slide transitions** control how one slide

replaces another on-screen. Subtle transitions can ease your viewers' gaze from one slide to the next—such as having the current slide gently fade out before the next one fades in. However, many transitions (such as checkerboards, pinwheels, and spinning "newsflashes") are like miniature animated shows themselves and are therefore distracting. These pointless transition effects not only disrupt the flow of your presentation, they can make the whole thing seem amateurish.

If you use a transition effect, use the same one throughout the presentation (so that audiences won't wonder whether there is some significance to a new transition at some point during the presentation), and choose the effect carefully. Aim for a smooth, subtle effect that is easy on the eye. And unless a sound effect is somehow integral to the message, there is no reason to add audio to a transition.

Builds control the release of text and graphics; they can be a great way to reveal information in easy-to-process pieces.

Builds are much more useful than transitions, at least when used with care and thought. These effects control the release of text and graphics on individual slides. For instance, with builds you can make a list of bullet points appear one at a time rather than having all of them appear at once, which makes it difficult to focus on a single point. This controlled release of information helps draw audience members' attention to the point being discussed and keeps them from reading ahead.

As with transitions, stick with the subtle, basic options for builds. The point of a build is to release information in a controlled fashion, not to distract or entertain the audience. Another useful option is to change the color of bullet points as you discuss each one. For instance, if your primary text color is a strong blue, you might have the text in each bullet point change to a light gray after you've finished talking about it. This subtle approach keeps the audience's attention focused on the bullet point you are currently discussing.

After you've assigned builds to your slides, you can control the build activity with a mouse or a remote control device. Experiment with the options in your software to find the most effective build scheme. In addition to building up text, you can build up graphical elements. For instance, to discuss monthly sales of three products over the past year, you can have a line graph of the first product appear by itself while you discuss it, and then you can click the mouse to display the second product's sales line and then the third.

Hyperlinks

Hyperlinks and action buttons can be quite handy when you need flexibility in your presentations or want to share different kinds of files with the audience. A **hyperlink** instructs your computer to jump to another slide in your presentation, to a website, or to

DEVELOPING AS A PROFESSIONAL

Being a Team Player

Professionals know that they are contributors to a larger cause, that it's not all about them. Just as in athletics and other team efforts, being a team player in business is something of a balancing act. On the one hand, you need to pay enough attention to your own efforts and skills to make sure you're pulling your own weight. On the other hand, you need to pay attention to the overall team effort to make sure the team succeeds. Remember that if the team fails, you fail, too.

Great team players know how to make those around them more effective, whether it's by lending a hand during crunch time, sharing resources, removing obstacles, making introductions, or offering expertise. In fact, the ability to help others improve their performance is one of the key attributes executives look for when they want to promote people into management.

Being a team player also means showing loyalty to your organization and protecting your employer's reputation—one of the most important assets any company has. Pros don't trash their employers in front of customers or in their personal blogs. When they have a problem, they solve it; they don't share it.

CAREER APPLICATIONS

1. If you prefer to work by yourself, should you take a job in a company that uses a team-based organization structure? Why or why not?
2. You can see plenty of examples of unprofessional business behavior in the news media and in your own experiences as a consumer and an employee. Why should you bother being professional yourself?

another program entirely. Depending on your presentation software, hyperlinks can be underlined text, invisible *hotspots* in graphical elements, or clearly labeled *action buttons*.

You can increase the flexibility of your presentation slides with hyperlinks that let you jump to different slides, websites, or other software screens.

Using hyperlinks is also a great way to customize your presentations, giving a linear presentation some of the flexibility of a nonlinear presentation. For instance, if you work in sales and call on a variety of customers, you can't be sure what sort of situation you'll encounter at each customer's site. You might be prepared to give an in-depth technical presentation to a group of engineers, only to have the company president walk in and request a brief financial overview instead. Or you might prepare a set of detailed technical slides to supplement your primary message but not show them unless the audience asks detailed questions.

Another challenging situation is finding out at the last minute that you have less time than you thought to make your presentation. If you've built in some flexibility, you won't need to rush through your entire presentation or scramble to find the most important slides. Instead, you can simply click an action button labeled "Five-minute overview" and jump right to the two or three most important slides in your presentation. With hyperlinks, you can even switch from the indirect approach to the direct approach or vice versa, based on the response you're getting from your audience. By building in links that accommodate these various scenarios, you can adjust your presentation at a moment's notice—and look polished and professional while you do it.

Multimedia Elements

Video clips can add memorable, engaging content to your presentations—as long as they are relevant, interesting, and brief.

Multimedia elements offer the ultimate in active presentations. Using audio and video clips can be an effective way to complement your live message, such as including a recorded message from a company executive or scenes from a customer focus group. Just be sure to keep these elements brief and relevant—as supporting points for your presentation, not as replacements for it.

USING PRESENTATION SOFTWARE TO CREATE VISUAL REPORTS

Visual reports are documents made using presentation software, but they are intended to be read like documents, not projected as presentation slides.

With its easy ability to combine text and graphics, presentation software is sometimes used to create *visual reports* that are something of a hybrid between conventional reports and presentation slides (see Figure 17.5). These are sometimes referred to as "slideuments" (*slide* + *document*) or "slide docs." If you have a lot of diagrams or other visual

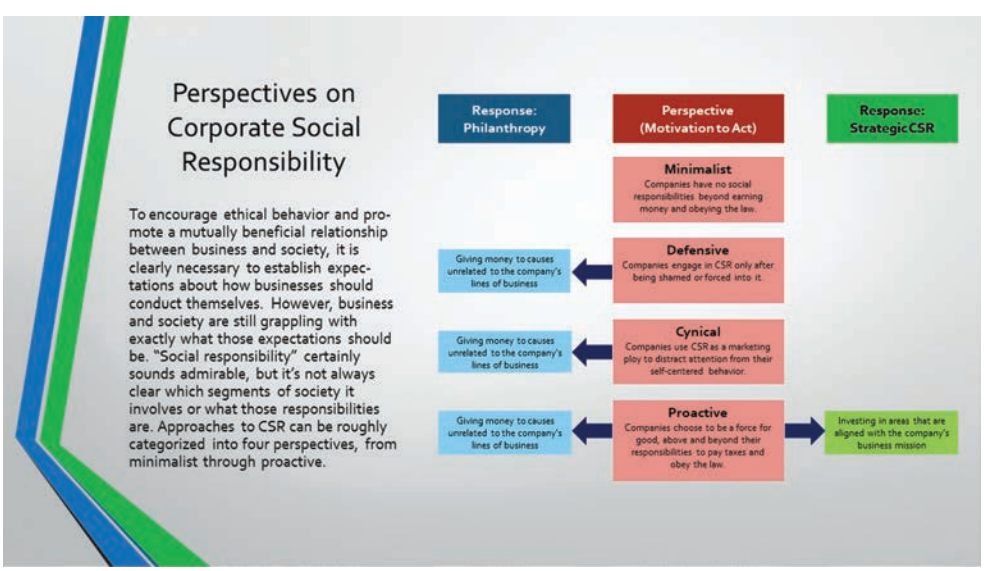


Figure 17.5 Visual Reports Using Presentation Software

Presentation software can be used to create visual reports that are designed to be read as other documents, rather than being projected as presentation slides.

Source: Courtland L. Bovée and John V. Thill, *Business in Action*, 9th ed. (Boston: Pearson, 2020), 99–102.

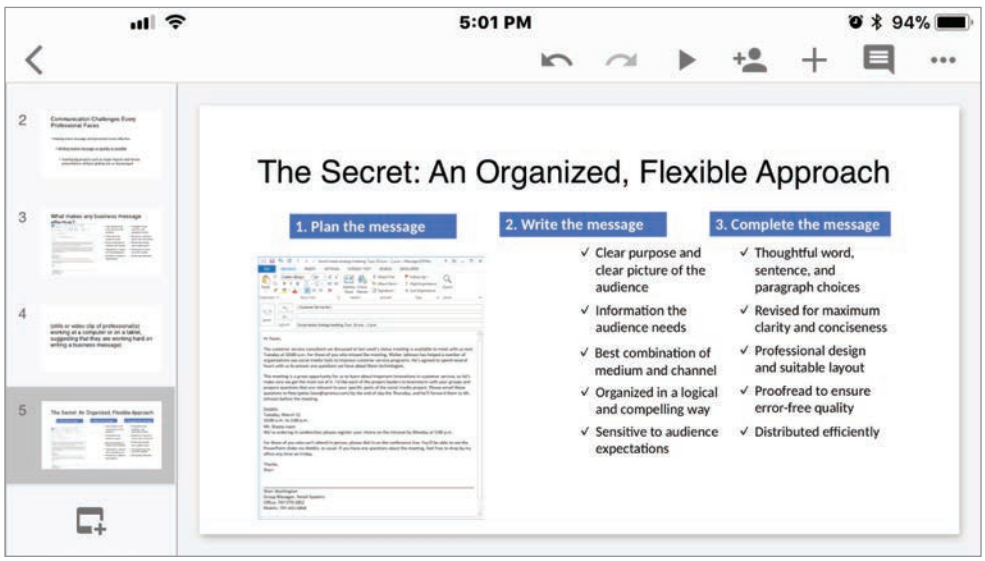


Figure 17.6 Using Mobile Devices in Presentations

Mobile presentation apps let you create and edit slides on the go as well as control presentations directly from your device.

Source: Adapted from Ramez Naguib, "International Audiences," Toastmasters International, accessed 8 February 2013, www.toastmasters.org; Patricia L. Kurtz, The Global Speaker (New York: AMACOM, 1995), 35–47, 56–68, 75–82, 87–100; David A. Victor, International Business Communication (New York: HarperCollins Publishers, 1992), 39–45; Lalita Khosla, "You Say Tomato," Forbes, 21 May 2001, 36; Stephen Dolainski, "Are Expats Getting Lost in the Translation?" Workforce, February 1997, 32–39.

material, creating a report in PowerPoint or similar software can be easier than doing so in word-processing software.

If they are intended to be read like documents, these visual reports can be an effective and appealing communication tool. As you can see from the amount of text in the example in Figure 17.5, however, these reports do not function well as slides and should not be used for presentations. Avoid the temptation to use these slide-report hybrids for presentation slides *and* as handouts.

As "Creating Effective Handouts" on page 506 explains, the ideal solution is to create an effective slide set and a separate handout document (either a visual report or a conventional report) that provides additional details and supporting information. This way, you can optimize each piece to do the job it is really meant to do.

USING MOBILE DEVICES IN PRESENTATIONS

MOBILE APP

Haiku Deck is a mobile-first presentation app that lets you create and present from your phone or tablet.

Keynote, PowerPoint, Prezi, and many other presentation tools are now available on mobile devices, which expands the flexibility you have for creating, practicing, and delivering presentations (see Figure 17.6). For example, you can control your presentation from your smartphone and draw on the projected image by drawing on your phone screen. Another handy feature is displaying your speaking notes on your phone. With cloud storage, you can access your presentation files from virtually anywhere.

Completing Slides and Support Materials

5 LEARNING OBJECTIVE

Explain the role of navigation slides, support slides, and handouts.

Review each slide carefully to make sure it is clear and readable.

Just as you would review any message for content, style, tone, readability, clarity, and conciseness, you should apply the same quality control to your slides and other visuals. As you look over your presentation for the final time, make sure that all visuals are

- **Readable.** Can text be read from the back of the room? Does the text stand out from the background?
- **Consistent.** Are colors and design elements used consistently?
- **Simple.** Is each slide and the entire presentation as simple as possible? Can you eliminate any slides?
- **Audience centered.** Are the message and the design focused on the audience?

- **Clear.** Is the main point of a slide obvious? Easy to understand? Can the audience grasp the main point in just a few seconds?[15]
- **Concise and grammatical.** Is text written in concise phrases? Are bulleted phrases grammatically parallel?
- **Focused.** Does each slide or Prezi story block cover only one thought, concept, or idea (or summarize a group of related ideas)? Does it grab the viewer's attention in the right place and support the key points of the message? Are arrows, symbols, or other techniques used to draw the audience's attention to the key sections of a chart or diagram?
- **Fully operational.** Have you verified every slide in your presentation? Do all the animations and other special effects work as you intended?

Use the slide sorter view to verify and modify the organization of your slides.

The *slide sorter* view (different programs have different names for this feature) lets you see some or all the slides in your presentation on a single screen. Use this view to add and delete slides, reposition slides, check slides for design consistency, and verify the operation of any effects. Moreover, the slide sorter is a great way to review the flow of your story.[16]

With your slides working properly and in clear, logical order, you're just a few steps away from being ready. Now is a good time to think about a backup plan. What will you do if your laptop won't turn on or the projector dies? Can you get by without your slides? For important presentations, consider having backup equipment on standby, loaded with your presentation and ready to go. You can also bring printed handouts to give the audience so that, as a last resort, you can give your presentation "on paper."

CREATING NAVIGATION AND SUPPORT SLIDES

Now that the content slides are ready, enhance your presentation with several slides that add "finish" to your presentation and provide additional information to benefit your audience:

- **Title slide(s).** Make a good first impression on your audience with one or two title slides, the equivalent of a report's cover and title page. A title slide should contain the title of your presentation (and subtitle, if appropriate), your name, your department affiliation (for internal audiences), and your company affiliation (for external audiences). You may also include the presentation date and an appropriate graphic element. Depending on the amount of information you need to convey at this point, two title slides might be appropriate: one focusing on the topic of the presentation and a second with your affiliation and other information. This second slide can also be used to introduce the speaker and list his or her credentials.
- **Agenda and program details.** You can use these slides to communicate the agenda for your presentation and any additional information your audience might need. Because presentations pull your audience members away from their daily routines and work responsibilities, they can have questions about anything from break times or lunch plans to the password needed to log onto the facility's wireless network. By answering these questions at the beginning of your presentation, you'll minimize disruptions later and help the audience stay focused on your message.
- **Navigation slides.** To tell your audience where you're going and where you've been, you can use a series of **navigation slides** based on your outline or agenda. This technique is most useful in longer presentations with several major sections. As you complete each section, repeat the slide but indicate which material has been covered and which section you are about to begin (see Figure 17.7 on the next page). This sort of slide is sometimes referred to as a *moving blueprint*. You can then use the original slide again in the close of your presentation to review the points you've covered. As an alternative to the repeating agenda slide, you

Navigation slides help your audience keep track of what you've covered already and what you plan to cover next.



Figure 17.7a Checking off topics already covered



Figure 17.7b Highlighting the next topic

Figure 17.7 Blueprint Slides
Here are two of the ways you can use a *blueprint slide* as a navigational aid to help your audience stay on track with the presentation. Figure 17.7a checks off the sections of the presentation that have already been covered. In contrast, Figure 17.7b uses a sliding highlight box to indicate the next section to be covered.

can insert a simple *bumper slide* at each major section break, announcing the title of the section you're about to begin.[17]

Figure 17.8 illustrates some of the many options you have for presenting various types of information. Note that although these slides don't follow a rigid structure of text-heavy bullet points, they are unified by the color scheme (a silver background and bold color accents) and typeface selections.

CREATING EFFECTIVE HANDOUTS

View handouts as an integral part of your presentation strategy so that they work in harmony with your presentation visuals and your spoken message.

Handouts—any printed materials you give the audience to supplement your talk—should be considered an integral part of your presentation strategy. Handouts can include detailed charts and tables, case studies, research results, magazine articles, and anything else that supports the main idea of your presentation. Rather than paper copies, you can also make handouts available as PDF for digital distribution.

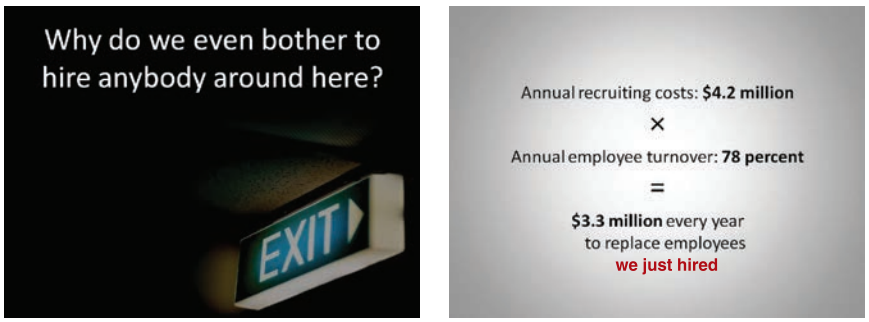
Plan your handouts as you develop your presentation so that you use each medium as effectively as possible. Your presentation should paint the big picture, convey and connect major ideas, set the emotional tone, and rouse the audience to action (if that is relevant to your talk). Your handouts can then carry the rest of the information load, providing the supporting details that audience members can consume at their own speed, on their own time. You won't need to worry about stuffing every detail into your slides because you have the more appropriate medium of printed documents to do that.

Timing the distribution of handouts depends on their content, the nature of your presentation, and your personal preference. For instance, some speakers like to distribute handout copies of their slides before the presentation begins so that the audience can take notes on them. Doing so can be risky, however, particularly if you've organized your talk with the indirect approach, because the audience can read ahead and reach the conclusion and recommendations before you're able to build up to them yourself.

For a quick review of the key steps in creating effective visuals, see "Checklist: Enhancing Presentations with Visuals."

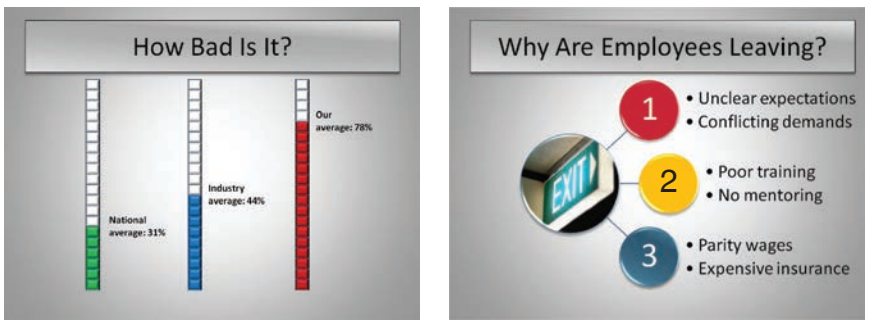
Left: This introductory slide is a blunt attention-getter, something that would have to be used with caution and only in special circumstances.

Right: This simple math equation gets the point across about how expensive high employee turnover is.



Left: This stylized bar graph sends a stark visual message about how bad the company's turnover really is.

Right: This slide is essentially a bullet list, with three groups of two bullets each. Repeating the photo element from the introductory slide emphasizes the message about employee turnover.

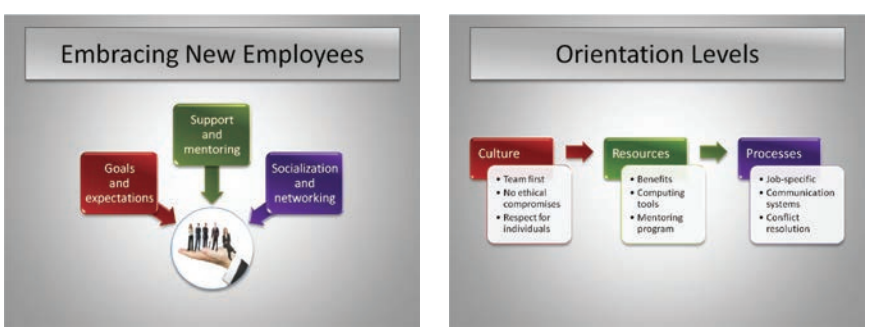


These two *navigation slides* show one way to introduce each of the four subtopics in this particular section. As the highlight moves around the central circle, the audience is reminded of which subtopics have been covered and which subtopic is going to be covered next. And each time it is shown, the message is repeated that all these problems are the "true cost of chaos" in the company's employment practices.



Left: This slide introduces three key points the speaker wants to emphasize in this particular section.

Right: This slide shows a linear flow of ideas, each with bulleted sub-points. This slide could be revealed one section at a time to help the speaker keep the audience's attention focused on a single topic.



Left: This flowchart packs a lot of information onto one slide, but seeing the sequence of events in one place is essential.

Right: This simple visual highlights the presenter's spoken message about being careful to choose the right tasks to focus on and then completing them quickly.

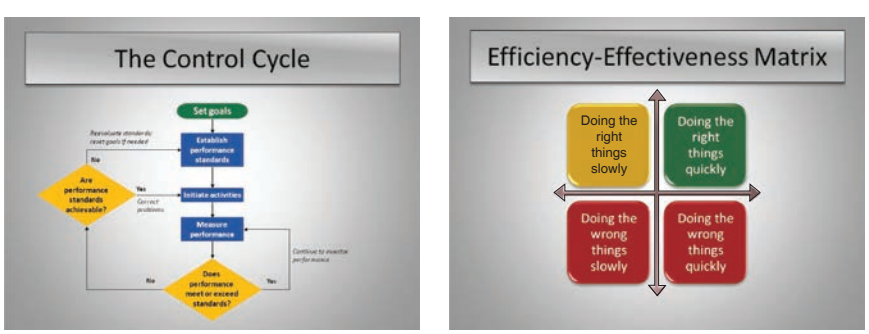


Photo credit: ESB Basic/Shutterstock

Figure 17.8 Designing Effective Visuals: Selected Slides
These slides, from a presentation that addresses a company's high employee turnover rate, illustrate the wide variety of design options you have for creating effective, appealing slides. (All the slides were created using features in PowerPoint.)

CHECKLIST ✓ Enhancing Presentations with Visuals

A. Plan your presentation visuals.
- Make sure you and your message, not your visuals, remain the focus of your presentation.
- Select your visuals carefully to support your message; use a combination of visuals if needed.
- Review your plan for each visual to make sure it truly supports your message.
- Follow effective design principles, with an emphasis on accuracy and simplicity.
- Budget your time wisely so that you have plenty of time to practice your presentation.

B. Choose structured or free-form slides.
- Structured slides using bullet-point templates are easy to create, require little time or skill to design, and can be completed in a hurry. Best uses: routine, internal presentations.
- Primary disadvantages of structured slides are mind-numbing repetition of bullet-point format and the common tendency of stuffing too much information on them.
- Free-form slides make it easier to combine textual and visual information, to create a more dynamic and engaging experience, and to maintain a conversational connection with the audience. Best uses: motivational, educational, and persuasive presentations.
- Primary disadvantages of structured slides are the time, skill, and imagery required; added responsibilities for the speaker; and the possibility of fragmenting complex topics.

C. Design effective slides.
- Don't use "slideuments" as presentation slides.
- Use color to emphasize important ideas, create contrast, isolate visual elements, and convey intended nonverbal signals.
- Limit color to a few compatible choices and use them consistently.
- Make sure your slide background doesn't compete with the foreground.
- Use decorative artwork sparingly and only to support your message.
- Emphasize functional artwork—photos, technical drawings, charts, and other visual elements containing information that is part of your message.
- Choose typefaces that are easy to read on-screen; limit the number of typefaces and use them consistently.
- Use slide masters to maintain consistency throughout your presentation.

D. Create effective slide content.
- Write content that will be readable from everywhere in the room.
- Write short, active, parallel phrases that support, not replace, your spoken message.
- Avoid complete sentences unless you need to quote verbatim.
- Limit the amount of text so that your audience can focus on listening, not reading.
- Simplify print graphics for use on slides but don't oversimplify.
- Use functional animation when it can support your message.
- Make sure slide transitions are subtle, if used at all.
- Use builds carefully to control the release of information.
- Use hyperlinks and action buttons to add flexibility to your presentation.
- Incorporate multimedia elements that can help engage your audience and deliver your message.

E. Complete slides and support materials.
- Review every slide carefully to ensure accuracy, consistency, and clarity.
- Make sure that all slides are fully operational.
- Use the slide sorter to verify and adjust the sequence of slides, if needed.
- Have a backup plan in case your slide plan fails.
- Create navigation and support slides.
- Create handouts to give the audience additional information and to minimize the amount of information you need to put on your slides.

COMMUNICATION CHALLENGES AT Duarte

You've joined the dozens of designers, trainers, and information specialists at Duarte. Use what you've learned in this chapter to address these two challenges.

INDIVIDUAL CHALLENGE: You've just been given the assignment to create presentation slides for a new client. The client, HouseYou, is a start-up that aims to compete with Airbnb in the private room- and house-rental business. The purpose of the presentation is to pitch the business idea to investors.

Your first task is to choose a color palette for the slides, which will also be used in the company's other promotional materials. Using any program or app you're comfortable with, choose five standard colors or mix your own. You'll need one dark color to use for slide backgrounds, one contrasting color for type on this dark background, and three compatible accent colors to use for various purposes. Study Airbnb's logo and make sure you don't choose any colors that are too similar. Using PowerPoint, Keynote, or Google Slides, create a few slides that show how

your color palette could be used in a presentation. (Don't worry about the content of the presentation; use any text and visual material that lets you show your five colors.)

TEAM CHALLENGE: With a team of classmates, search the Creative Commons website for attractive photos that could be used on slides to help illustrate or emphasize the following message points in a presentation:

- Trends in health-care costs
- Competition
- High levels of employee engagement (the energy, enthusiasm, and effort employees put into their work)
- Consumer hyperchoice (situations in which shoppers have such an overwhelming array of choices in a given product category that purchase decisions become difficult and stressful)
- Scalability (the ease with which a business process or an entire company can be expanded to handle a greater number of transactions)

For each message point, find three good images and then decide as a team which one conveys the point most effectively and in the most appropriate style for a fairly formal business presentation. Create a slide show in which you show the photos, describe how each one conveys the concept in question, and explain why you chose the one you think is most effective. Make sure you follow the usage and attribution guidelines for any photos you find online.

Key Terms

builds Effects that control the release of text, graphics, and other elements on individual slides

free-form slides Presentation slides that are not based on a template, often with each slide having a unique look but unified by typeface, color, and other design choices; tend to be much more visually oriented than structured slides

hyperlink Link embedded in a presentation that instructs your computer to jump to another slide in your presentation, to a website, or to another program

navigation slides Noncontent slides that tell your audience where you're going and where you've been

slide transitions Software effects that control how one slide replaces another on-screen

structured slides Presentation slides that follow the same design templates throughout and give all the slides in a presentation the same general look; they emphasize textual information in bullet-point form

Summary of Learning Objectives

1 Explain the role of visuals in business presentations, and list the types of visuals commonly used. Visuals create interest, illustrate and clarify important points, add variety, and help the listener absorb the information you're presenting. Prezi-style and conventional slide presentations are the most common tools for business presentations, but you might also use overhead transparencies, chalkboards and whiteboards (including digital whiteboards), flip charts, product samples, models, video, and various software programs.

2 Explain the difference between structured and free-form slides, and suggest when each design strategy is more appropriate. Structured slides follow the same design plan for most or all the slides in a presentation. They are often created by using the templates provided with PowerPoint and other presentation programs. Structured slides tend to convey most of their information through bullet points. In contrast, free-form slides do not follow any set design scheme from slide to slide, although they can and should use color, font selection, and other design choices to create a unified feel across a presentation. Free-form slides often have just a single statement on each slide, requiring many more slides to cover the same amount of material as the typical structured design.

The ease and speed with which structured slides can be created make them most useful for routine presentations such as project update meetings, particularly for internal audiences and in situations in which the slide deck will be used only once. They can also be useful when the audience needs to see several information points on-screen simultaneously in order to make comparisons. Given their ability to excite and engage, free-form designs are particularly good for motivational, educational, and persuasive presentations—particularly when the slides will be used multiple times and therefore compensate for the extra time and effort often required to create them.

3 Outline the decisions involved in using a key visual and selecting color, artwork, and typefaces to create effective slide designs. Using a key visual involves selecting a single, simple visual element as a structure for the elements on a slide. For example, a circle can be used to identify the points in a repeating process, and a triangle can establish the interrelationship of three entities.

Color is a critical design element because it can grab the viewer's attention, emphasize important ideas, create contrast, isolate particular slide elements, stimulate emotions, and send powerful nonverbal messages such as elegance or technical sophistication. Color also affects the acceptance and retention of messages. When selecting color, limit your choices to a few compatible ones and use them consistently.

Slides have two layers of visual elements, the *background* (which should be as unobtrusive as possible) and the *foreground*, which carries the information content of the slide. Artwork on the background and foreground can be divided into *functional*, which conveys information directly, and *decorative*, which does not. Well-designed functional artwork is always useful and a great way to convey message points quickly. Decorative artwork can be useful if it supports the message point on a slide, but it can be distracting otherwise.

Typefaces and type styles need careful consideration to ensure that they are easily readable from every point in the

presentation room. Clean, sans serif typefaces are usually the best choice, although serif typefaces can be useful when used in large sizes. In general, avoid decorative typefaces except for limited, special purposes.

4 Explain how to create effective slide content. Slide content can be divided into three groups: text, tables and graphics, and animation and multimedia. To choose effective words and phrases, think of the text on your slides as a guide to the content, not the content itself. For all-text slides, try to limit the content to four or five lines, with four or five words per line, and use short phrases rather than full sentences.

To create effective tables and graphics, keep in mind that visuals for projection need to be simpler than those used for print documents. If necessary, create simplified versions for your slides and provide the full-detail versions in a printed handout.

Like artwork, animation can be functional or decorative. Functional animation can be a powerful way to demonstrate processes and procedures. Decorative animation is nearly always a distraction and should be avoided. Slide transitions, which control how one slide replaces another on-screen, are a form of animation. Except for subtle transitions, such as a gentle fade to black, avoid using most of the transitions that come with your software. Builds, on the other hand, can be extremely helpful by letting you control the release of individual text points or graphical elements on a slide.

Hyperlinks instruct your software to jump to another slide in your presentation, to a website, or to another program entirely. They can be handy for designing flexibility into your presentations and for sharing other types of files with the audience.

Audio, video, and other multimedia files can complement your live message, but make sure they support your message rather than replace it.

5 Explain the role of navigation slides, support slides, and handouts. In addition to the slides that convey your content, you can create one or more *title slides* to introduce your presentation (and yourself, if necessary), *agenda and program detail slides* that tell viewers what to expect during the presentation and provide information to help them plan their time, and *navigation slides* that help you and your audience keep track of where you are in the presentation. Particularly for longer presentations, a *moving blueprint* slide is a great way to show the audience what has been covered so far and what is still to come.

Handouts should be considered an integral part of your presentation, working in conjunction with your slides and spoken message to provide audience members with additional details, supporting documents, and other material too detailed to include in the presentation itself.

Test Your Knowledge

To review chapter content related to each question, refer to the indicated Learning Objective.

17-1. What are your options for supporting a presentation with visuals? [LO-1]
17-2. What are the potential disadvantages of Prezi-style presentations? [LO-1]
17-3. How do structured and free-form slide designs differ? [LO-2]
17-4. What should the role of the background be in a slide? [LO-3]
17-5. How does Guy Kawasaki's "30-point rule" for fonts (see page 498) help ensure readable and memorable slide content? [LO-3]
17-6. Why is it important to avoid arbitrarily changing colors throughout a presentation? [LO-3]
17-7. What is the recommended number of fonts to use per slide? [LO-4]
17-8. How do slide transitions differ from builds? [LO-4]
17-9. How is a moving blueprint slide used in a presentation? [LO-5]
17-10. How does the slide sorter view facilitate the editing process for a presentation? [LO-5]

Apply Your Knowledge

To review chapter content related to each question, refer to the indicated Learning Objective.

17-11. Would you choose a structured or free-form design plan for a presentation about upcoming changes in international accounting regulations? Why? [LO-2]
17-12. How can you use slide masters to enhance the effectiveness of your slides? [LO-3]
17-13. Is it ethical to use design elements and special effects to persuade an audience? Why or why not? [LO-3]
17-14. If you are giving a presentation to company management using the indirect approach to recommend that the company consolidate its manufacturing operations (a traumatic change that would result in the loss of hundreds of jobs, including a dozen management positions), would it be wise to hand out copies of your slides at the beginning of the presentation? Why or why not? [LO-5]

Practice Your Skills

Messages for Analysis

17-15. **Improving a Slide** Examine the slide in Figure 17.9 and point out any problems you notice. How would you correct these problems?
17-16. **Modifying Graphs for Presentation** Examine the graph in Figure 17.10 and explain how to modify it for a presentation, using the guidelines discussed in this chapter.



Figure 17.9 Piece of Cake Bakery Customer Survey

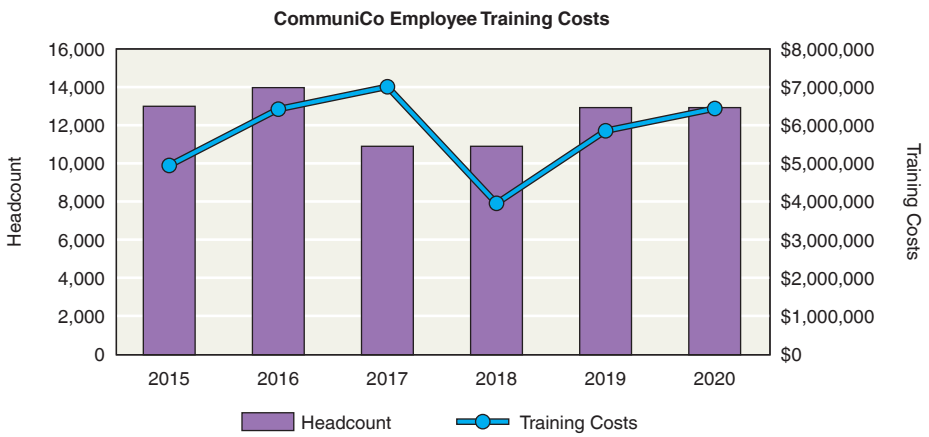


Figure 17.10 CommuniCo Employee Training Costs

Exercises

Each activity is labeled according to the primary skill or skills you will need to use. To review relevant chapter content, you can refer to the indicated Learning Objective.

17-17. **Designing Effective Slides** [LO-2] Find a business-related slide presentation on SlideShare (www.slideshare.net) and analyze the design. Do you consider it structured or free form? Does the design help the audience understand and remember the message? Why or why not? What improvements to the design would you suggest? Is the slide set understandable on its own?

17-18. **Designing Effective Slides** [LO-3] Think about a company you might like to start after graduation and imagine that you are giving a brief presentation to potential investors. Review the design templates or themes available in whatever presentation software you have available, such as Microsoft PowerPoint, Apple Keynote, or Google Slides. Choose a template and color palette that best support the message you want to convey to these financiers. Write a one-page report or brief blog post that includes a sample slide using this theme and color palette and an explanation of how this design supports your message.

17-19. **Creating Effective Slide Content** [LO-4] Find an article in the business press that discusses issues a specific company or industry is facing. Based on the information in the article and the guidelines discussed in this chapter, create three to five presentation slides summarizing these issues.

17-20. **Creating Effective Slide Content** [LO-4] Locate one of the tables elsewhere in the book and convert it to presentation slides so that the content is easily readable in a large conference room. (Be sure to select one of the shorter tables.) Choose whether to use free-form or structured slides, and decide how much content will be on the

slides and how much will be spoken by the presenter. Provide speaker's notes along with your slides.

17-21. **Creating Effective Slide Content; Mobile Skills** [LO-4] Find a business-oriented presentation on SlideShare or another online source. Re-create four of the slides so they will be more effective on small mobile screens, and then assemble a before-and-after presentation that highlights the changes you made.

Expand Your Skills

Critique the Professionals

Dave Paradi, the author of *The Visual Slide Revolution*, specializes in helping presenters transform text-heavy slides into more readable and more effective visuals. Visit his YouTube channel at www.youtube.com/thinkoutsidetheslide and find one of his "Slide Makeover" videos. Using whatever medium your instructor requests, summarize the changes Paradi made to the slide in question and explain in your own words why these changes made the slide more effective.

Sharpening Your Career Skills Online

Find a website, video, article, podcast, or presentation that offers advice on creating slides and other presentation visuals. Write a brief email message to your instructor, describing the item that you found and summarizing the career skills information you learned from it.

Build Your Career

In previous chapters, you worked on the introductory statement and education section of your résumé. Now it's time for the other major section in a chronological or combination résumé, which is your work experience. Start by listing all the positions you've held; then decide how many to include based on your years in the job market. If you don't have much or any full-time work experience yet, use part-time jobs, volunteering assignments, and academic roles. If you've been in the workforce for up to 10 or 15 years, you'll generally want to list all the positions you've held since graduation. If you have more than 15 years of experience, include as much of your job history as is still relevant to the positions you are seeking.

Following the advice on page 532 in Chapter 18 under "Work Experience, Skills, and Accomplishments," describe your accomplishments in each position in a way that mirrors back the job descriptions of the positions you are or will likely be applying for.

With your introductory statement, education, and work experience sections in hand, you'll have the bulk of your résumé completed.

Cases

For all cases, feel free to use your creativity to make up any details you need to craft effective messages.

PRESENTATION SKILLS

17-22. Planning, Designing, and Creating Presentation Slides [LO-1], [LO-2], [LO-3], [LO-4] Select the Communcation Close-Up from the beginning of any chapter in the book and decide whether free-form or structured slides would be the most effective way to present this story to an audience of business professionals.

Your task: Using whichever design approach you think is better, create a brief presentation (slides and speaking notes) to tell the story.

PRESENTATION SKILLS

17-23. Planning, Designing, and Creating Presentation Slides [LO-1], [LO-2], [LO-3], [LO-4] Many companies publish stories of their founding and early years as a way to convey the company's strengths and values.

Your task: Choose Hewlett-Packard, IBM, John Deere, or another U.S. company that has been in business for at least four decades and prepare a 10-minute presentation on its history.

PRESENTATION SKILLS/TEAM SKILLS

17-24. Planning, Designing, and Creating Presentation Slides [LO-1], [LO-2], [LO-3], [LO-4]

Your task: Visit health.gov/dietaryguidelines and download the latest edition of *Dietary Guidelines for Americans*. With your team, develop a presentation no longer than 15 minutes, using a Prezi or free-form slides, that conveys the key points from one chapter of the document. You don't need to pack all the information from the chapter onto your slides; you can assume that the chapter will be available as a handout to anyone who attends your presentation. Along with your presentation, draft speaking notes that someone outside your team could use to give the presentation. You can use images from the *Guidelines* PDF, the websites of the U.S. Department of Agriculture and the U.S. Department of Health and Human Services, or a nongovernment source such as Creative Commons (creativecommons.org). Make sure you follow the usage and attribution guidelines for any photos you find on nongovernment sites.

PRESENTATION SKILLS

17-25. Planning, Designing, and Creating Presentation Slides [LO-1], [LO-2], [LO-3], [LO-4] *PechaKucha* is a style of presentation that might be the ultimate in creative constraint: The speaker is limited to 20 slides, each of which is

displayed for exactly 20 seconds before automatically advancing. PechaKucha Nights, which are open to the public, are now put on in cities all over the world. Visit www.pechakucha.com for more information on these events or to view some archived presentations.

Your task: Chose any topic that interests you and develop a PechaKucha-style presentation with 20 slides, each designed to be displayed for 20 seconds. Use the slide timing capabilities in your presentation software to control the pace. Make sure you practice before presenting to your class so that you can hit the precise timing requirements.[18]

PRESENTATION SKILLS

17-26. Planning, Designing, and Creating Presentation Slides [LO-1], [LO-2], [LO-3], [LO-4] Learning to play a musical instrument offers children multiple benefits beyond the joys of creating and appreciating music.

Your task: Research the benefits of learning and playing an instrument, and then prepare a brief presentation that conveys these benefits in a way that most parents would find compelling.

PRESENTATION SKILLS/PORTFOLIO BUILDER

17-27. Planning, Designing, and Creating Presentation Slides [LO-1], [LO-2], [LO-3], [LO-4] Small farmers looking for more predictable revenue and consumers who want to eat fresh local produce have found a match in *community-supported agriculture (CSA)*. CSA is essentially a subscription service in which consumers sign up for regular allotments of fruits and vegetables from a local farm. At regular intervals during the growing season, each subscriber gets a box of whatever produce is ripe and ready at that time.

Your task: Visit Local Harvest at www.localharvest.org to learn more about CSA and to find CSA farms in or near your area. Prepare a brief presentation on how these programs work and how they benefit farmers and consumers.

PRESENTATION SKILLS/PORTFOLIO BUILDER

17-28. Planning, Designing, and Creating Presentation Slides [LO-1], [LO-2], [LO-3], [LO-4] One could argue that sleep is the single most important element of healthy living. Not only is adequate sleep essential for the body on its own, but getting enough sleep enables other activities that are essential for health, including getting exercise and taking the time to eat a healthy diet. Unfortunately, millions of people who recognize the value of sleep and want nothing more than to get enough sleep every night are often unable to do so.

Your task: Visit the National Sleep Foundation website at www.sleepfoundation.org to learn about the types and causes of insomnia and the cures most often recommended by sleep specialists. Using Prezi or slide software, prepare a 10- to 15-minute presentation on why insomnia affects so many people and the steps people can take to reduce or eliminate it.

PRESENTATION SKILLS/TEAM SKILLS/PORTFOLIO BUILDER

17-29. Planning, Designing, and Creating Presentation Slides [LO-1], [LO-2], [LO-3], [LO-4] In your job as a business development researcher for a major corporation, you're asked to gather and process information on a wide variety of subjects. Management has gained confidence in your research and analysis skills and would now like you to begin making regular presentations at management retreats and other functions. The first series of presentations is on lessons to learn from successful companies.

Your task: With a team assigned by your instructor, choose one of the companies from this list and conduct enough research to familiarize yourself with its basic business model and product or service offerings:

- Alibaba
- Caterpillar
- Berkshire Hathaway
- BlackRock
- Netflix
- Singapore Airlines
- Unilever

Identify at least three factors that contribute to the firm's success. Prepare a 10-minute presentation that introduces the company, outlines its business model and product portfolio, and discusses the success factors you have identified.

PRESENTATION SKILLS/PORTFOLIO BUILDER

17-30. Planning, Designing, and Creating Presentation Slides [LO-1], [LO-2], [LO-3], [LO-4] Depending on the sequence your instructor chose for this course, you've probably covered at least a dozen chapters at this point and learned or improved many valuable skills. Think through your progress and identify five business communication skills that you've either learned for the first time or developed during this course.

Your task: Create a 10-minute Prezi or slide presentation that describes each of the five skills you've identified. Be sure to explain how each skill could help you in your career. Use any visual style that you feel is appropriate for the assignment.

PRESENTATION SKILLS/TEAM SKILLS/PORTFOLIO BUILDER

17-31. Planning, Designing, and Creating Presentation Slides [LO-1], [LO-3], [LO-4] In its competitive battles with AT&T and other phone and internet service providers, Verizon seeks to attract and keep not just customers but top employees. Engineers and technicians obviously play a vital role in a technology company such as Verizon, but the firm also needs specialists in everything from accounting to public relations to real estate.

Your task: Prepare a brief presentation (Prezi or slides) that Verizon recruiters could use at job fairs and other venues to entice both new graduates and experienced professionals to consider joining the company. Create an appropriate amount

of visual material for a presentation that is at least 10 minutes but no longer than 15 (not including a question-and-answer period). Assume the audience members have heard of Verizon but don't have any in-depth knowledge about the company. Visit the company's website at **www.verizon.com** to learn more about the benefits of working there.

PRESENTATION SKILLS/TEAM SKILLS

17-32. Planning, Designing, and Creating Presentation Slides [LO-1], [LO-2], [LO-3], [LO-4] Screencasting is a great way to demonstrate how to use software or to review a website or online service. Screencast-O-Matic lets you create free screencasts up to 15 minutes long. (Your college or university may have a site license to use the service; check with your instructor.)

Your task: Visit **screencast-o-matic.com** and watch the introductory tutorials and the scripted recording tutorials. Next, choose a PC or Mac software program or a website that interests you. Choose something substantial enough that you can talk about it for 5 to 10 minutes, as either a demo or a review. Write the script for your screencast, and then record it using the Screencast-O-Matic system. Format and deliver the video as your instructor requests.

Endnotes

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PART 7 Writing Employment Messages and Interviewing for Jobs

CHAPTER 18 Building Careers and Writing Résumés

CHAPTER 19 Applying and Interviewing for Employment

The same techniques you use to succeed in your career can also help you launch and manage that career. Understand the employer's perspective on the hiring process so that you can adapt your approach and find the best job in the shortest possible time. Learn the best ways to craft a résumé and the other elements in your job-search portfolio. Understand the interviewing process to make sure you're prepared for every stage and every type of interview.



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18 Building Careers and Writing Résumés

LEARNING OBJECTIVES

After studying this chapter, you will be able to

1. List eight key steps to finding the ideal opportunity in today's job market.
2. Explain the process of planning your résumé, including how to choose the best résumé organization.
3. Describe the tasks involved in writing your résumé, and list the sections to consider including in your résumé.
4. Characterize the completing step for résumés, including the five most common formats in which you can produce a résumé.
5. Identify nine tips for creating a successful LinkedIn profile.



ESB Professional/Shutterstock

Burning Glass applies artificial intelligence to the challenges of matching employer needs with employee skill sets.

COMMUNICATION CLOSE-UP AT

Burning Glass

www.burning-glass.com

Finding a job opening that matches your interests and qualifications—and then convincing employers you are the best person for the job—can be one of the most complicated, aggravating, and downright mystifying tasks you ever undertake.

If you eventually move into management or take the entrepreneurial plunge and build your own company, you'll encounter this matchmaking challenge from the other side of the table. When a single job opening can attract dozens or hundreds of applicants, how can you sort through all the possibilities to identify the most promising candidates who warrant the time and expense of interviewing?

The challenge of matching the right people with the right jobs isn't limited to employees and employers, either. It's a vital issue for governments and educational institutions as well. Government bodies from the local up to the national level need to make workforce policy and investment decisions that reflect the real-world problems employees and employers encounter. And in the career-related facets of their broader educational missions, high schools, colleges, and universities need to understand what employers are looking for in order to provide the training and education that best prepare students for the job market. In other words, matching people and job opportunities is one of society's most important challenges, and doing it well or poorly has a tremendous impact on everyone's financial well-being.

To a large degree, at every level this challenge is all about getting one's hands on the right information and using it to make smart decisions. With more than 150 million employees in the United States alone, though, the amount of workforce data is massive.

To extract usable insights from this ocean of data, the Boston-based firm Burning Glass applies the power of artificial intelligence in a specialty known as job market analytics. In particular, it studies millions of job postings and career transitions to figure out what employers are looking for, what employees have to offer, and where gaps exist between the two sides. (Incidentally, when it studied the most important "baseline skills" across all professions, the company identified overall communication abilities as the most important skill and writing as the third-most important skill.)

Burning Glass integrates these job market insights into a variety of software tools that are used by employers, job seekers,

colleges, and other parties involved in meeting the job-match challenge. In the human resources area, this software works in conjunction with *applicant tracking systems*, which you are sure to encounter at some point in your job search. Before a human being reads your résumé, it will likely be "read" by such a system, designed to help company recruiters find the most promising candidates and manage communication and data collection all the way through the recruiting, hiring, and orientation stages.

It's difficult to fault the basic concept of an applicant tracking system. Software helps business professionals make all kinds of decisions, and most medium-sized and large companies get swamped with so many résumés that they rely on software to help recruiters manage the flow. However, the technology has developed a negative reputation in some quarters. Applicants express frustration that they can't get past a "robot" to describe their qualifications to an actual human being. Employers get frustrated when people clog their systems by applying for jobs for which they are clearly not qualified or when applicants try to game the system by loading up their résumés with stacks of keywords they think the system is looking for. And employers sometimes complain they can't find enough good applicants, even as good applicants are banging on the door but can't get in. Overly aggressive filtering can be a problem with poorly configured systems or for employers who dial up the qualification requirements to the point that only a superhero could make it over the barrier.

Companies such as Burning Glass aim to make this process work better for everybody by moving beyond simple keyword searches and résumé cataloging. For example, Burning Glass's technology analyzes how keywords are used in a résumé to separate candidates who describe themselves legitimately and naturally from those who are simply stuffing their résumés with keywords. The software has learned to read résumés the way human recruiters do, evaluating keywords in context to make informed judgments about the quality and currency of the skills someone has included. If the system is searching for candidates with database design experience, for instance, it can tell whether somebody took a class in the subject 10 years ago or is currently applying those skills in a professional capacity.

From an applicant's perspective, the best way to "beat the robots" is to stop trying to beat them. Don't try to trick the system by including every keyword you can find or try to improve your odds by blasting your application to hundreds of openings. Instead, take the time to read job descriptions carefully so you can concentrate on the ones where you fit best and so you can understand employers' needs well enough that you can explain how your skills and experience align with those needs. Even though you may have to go through a machine to get to an actual human, using the same audience-focused skills and techniques you've been practicing throughout this course is the best way to get there.[1]

Finding the Ideal Opportunity in Today's Job Market

1 LEARNING OBJECTIVE
List eight key steps to finding the ideal opportunity in today's job market.

Software developers such as Burning Glass (profiled in the chapter-opening Communication Close-Up) play an important role in today's job market, as employers in every industry try to find the best talent for every opening.

From the employee's side, identifying and landing a job can be a long and challenging process. Fortunately, the skills you're developing in this course will give you a competitive advantage. This section offers a general job-search strategy with advice that applies to just about any career path you might want to pursue. As you craft your personal strategy, keep these five guidelines in mind:

If you haven't already, read the Prologue, "Building a Career with Your Communication Skills," before studying this chapter.

- **Get organized.** Your job search could last many months and involve multiple contacts with dozens of companies. You need to keep all the details straight to ensure that you don't miss opportunities or make mistakes, such as losing someone's email address or forgetting an appointment.
- **Start now and stick to it.** Even if you are a year or more away from graduation, now is not too early to get started with some of the essential research and planning tasks. If you wait until the last minute, you might miss opportunities and you won't be as prepared as other candidates.
- **Look for stepping-stone opportunities.** If you can't find the opportunity you're looking for right away, you might need to take a job that doesn't meet your expectations while you keep looking to get on the right track. But view every job as an opportunity to learn workplace skills, observe effective and ineffective business practices, and fine-tune your sense of how you'd like to spend your career.
- **Expect to interact with intelligent technology throughout the job-search process.** To find the best employees and reduce the demands on their recruiting staffs, many companies now use a range of artificial intelligence (AI) tools to find potential hires,

filter applications, interact with candidates, evaluate résumés, and even conduct screening interviews via chat or video. You may receive unsolicited messages from bots or "virtual agents" inviting you to apply for jobs, too. (Make sure these are from legitimate companies before responding.)[2]

- **Clean up your digital footprint before you start applying for jobs.** If there is anything about you online that could harm your job prospects, chances are an employer will find it during the recruiting process. Review all your social media profiles and posts, and consider removing anything that might be worrisome to recruiters (human or AI). Recruiters even have tools that attempt to analyze your personality based on your social media activity, so make sure your public digital presence reflects who you intend to be as a professional.[3]

WRITING THE STORY OF YOU

What's your story? Thinking about where you've been and where you want to go will help focus your job search.

Writing or updating your résumé is a great opportunity to step back and think about where you've been and where you'd like to go. Do you like the path you're on, or is it time for a change? Are you focused on a particular field, or do you need some time to explore?

You might find it helpful to think about the "story of you"—the things you are passionate about, your skills, your ability to help an organization reach its goals, the path you've been on so far, and the path you want to follow in the future (see Figure 18.1 on the next page). Think in terms of an image or a theme you'd like to project. Are you academically gifted? An effective leader? A well-rounded professional with wide-ranging talents? A creative problem solver? A technical wizard? Writing your story is a valuable planning exercise that helps you think about where you want to go and how to present yourself to target employers.

MOBILE APP

The **Good&Co** app aims to help professionals find jobs that bring more meaning to their careers.

LEARNING TO THINK LIKE AN EMPLOYER

Employers judge their recruiting success by *quality of hire*, so take steps to present yourself as a high-quality hire.

Now switch sides and look at the hiring process from an employer's perspective. Recognize that companies take risks with every hiring decision—the risk that the person hired won't meet expectations and the risk that a better candidate slipped through their fingers. Many companies judge the success of their recruiting efforts by *quality of hire*, a measure of how closely new employees meet the company's needs.[4] Given this perspective, what steps can you take to present yourself as the low-risk, high-reward choice?

In addition to your skills, employers want to know if you are reliable and motivated—if you're somebody who "gets it" when it comes to being a professional.

Of course, your perceived ability to perform the job is an essential part of your potential quality as a new hire. However, hiring managers consider more than just your ability to handle the job. They want to know if you'll be reliable and motivated—if you're somebody who "gets it" when it comes to being a professional in today's workplace. Table 18.1 on page 521 lists the attributes companies list most frequently when looking for new employees. You'll recognize many of these from the discussions of professionalism and career skills in Chapter 1.

RESEARCHING INDUSTRIES AND COMPANIES OF INTEREST

Learning more about professions, industries, and individual companies is a vital step in your job search. It also impresses employers, particularly when you go beyond the easily available sources such as a company's own website. Table 18.2 on page 521 lists some of the many websites where you can learn more about companies and find job openings. Your college's career center placement office probably maintains an up-to-date list as well.

Employers expect you to be familiar with important developments in their industries.

To learn more about contemporary business topics, scan leading business periodicals and newspapers with significant business sections. In addition, thousands of bloggers, Twitter users, and podcasters offer news and commentary on the business world. AllTop (**alltop.com/business**) is another good resource for finding people who write about topics that interest you. In addition to learning more about professions and opportunities, this research will help you get comfortable with the jargon and buzzwords currently in use in a particular field, including essential *keywords* to use in your résumé (see page 529).

My Story

Where I Have Been

- Honor student and all around big shot in high school (but discovered that college is full of big shots!)
- Have worked several part-time jobs; only thing that really appealed to me in any of them was making improvements, making things work better

← What experiences from your past give you insight into where you would like to go in the future?

Where I Am Now

- Junior; on track to graduate in 2021
- Enjoy designing creative solutions to challenging problems
- Not a high-end techie in an engineering sense, but I figure most things out eventually
- Not afraid to work hard, whatever it takes to get the job done
- I can tolerate some routine, as long as I have the opportunity to make improvements if needed
- Tend to lead quietly by example, rather than by visibly and vocally taking charge
- Knowing that I do good work is more important than getting approval from others
- I tend not to follow fads and crowds; sometimes I'm ahead of the curve, sometimes I'm behind the curve

← Where do you stand now in terms of your education and career, and what do you know about yourself?

Where I Want to Be

- Get an advanced degree; not sure what subject area yet, though
- Haven't really settled on one industry or profession yet; working with systems of any kind is more appealing than any particular profession that I've learned about so far
- Develop my leadership and communication skills to become a more "obvious" leader
- Collaborate with others while still having the freedom to work independently (maybe become an independent contractor or consultant at some point?)
- Have the opportunity to work internationally, at least for a few years
- Like the big bucks that corporate executives earn but don't want to live in the public eye like that or have to "play the game" to get ahead
- Believe I would be good manager, but not sure I want to spend all my time just managing people
- Want to be known as an independent thinker and creative problem solver, as somebody who can analyze tough situations and figure out solutions that others might not consider
- Are there jobs where I could focus on troubleshooting, improving processes, or designing new systems?

← What would you like your future to be? What do you like and dislike? What would you like to explore? If you haven't figured everything out yet, that's fine—as long as you've started to think about the future.

Figure 18.1 Writing the Story of You
Writing the "story of you" is a helpful way to think through where you've been in your life and career so far, where you are now, and where you would like to go from here. Remember that this is a private document designed to help you clarify your thoughts and plans, although you will probably find ways to adapt some of what you've written to various job-search documents, including your résumé.

MOBILE APP
The **Indeed.com** app lets you search for jobs and apply from your phone.

Take advantage of job-search apps as well, including those offered by job-posting websites and major employers (see Figure 18.2 on page 522). You can use them to learn more about the company as well as about specific jobs. In addition to researching companies and applying for openings, integrating a mobile device into your job-search strategy can help with networking and staying on top of your active job applications. For instance, some companies don't wait long after extending an offer. If they don't hear from the top candidate in a short amount of time, they'll move on to their next choice. By staying plugged in via your mobile device, you won't let any opportunities pass you by.

TRANSLATING YOUR GENERAL POTENTIAL INTO A SPECIFIC SOLUTION FOR EACH EMPLOYER

An essential task in your job search is presenting your skills and accomplishments in a way that is relevant to the employer's business challenges.

An important aspect of any employer's quality-of-hire challenge is trying to determine how well a candidate's attributes and experience will translate into the demands of a specific position. As a job candidate, customizing your résumé to each job opening is

TABLE 18.1 Attributes That Will Help You Stand Out in the Job Market

Core Business Skills	Personal Qualities
• Oral and written communication	• Committed to excellence; dissatisfied with mediocrity
• Communication with diverse audiences	• Dependable and accountable
• Information technology skills	• Committed to something greater than oneself
• Data literacy	• Confident but not brash
• Collaboration	• Curious, driven to learn
• Situation analysis and problem solving	• Flexible, adaptable, and open to change
• Time and resource management	• Respectful and inclusive
• Project management	• Ethical; lives and works with integrity
• Leadership	• Positive, resilient, able to roll with the punches and recover from setbacks
• Critical thinking	• Sensitive to expectations of etiquette
	• Self-reliant
	• Proactive; taking initiative without waiting to be told
	• Ambitious and goal-oriented

Sources: Based in part on Alison Doyle, "The Top Skills Employers Seek in College Grads," *The Balance*, 17 April 2018, www.thebalance.com; "Career Readiness Defined," National Association of Colleges and Employers, accessed 30 May 2019, www.naceweb.org; Penny Loretto, "The Top 10 Work Values Employers Look For," *The Balance Careers*, 15 March 2018, www.thebalance.com; Liz Ryan, "12 Qualities Employers Look For When They're Hiring," *Forbes*, 2 March 2016, www.forbes.com.

TABLE 18.2 Selected Job-Search Websites

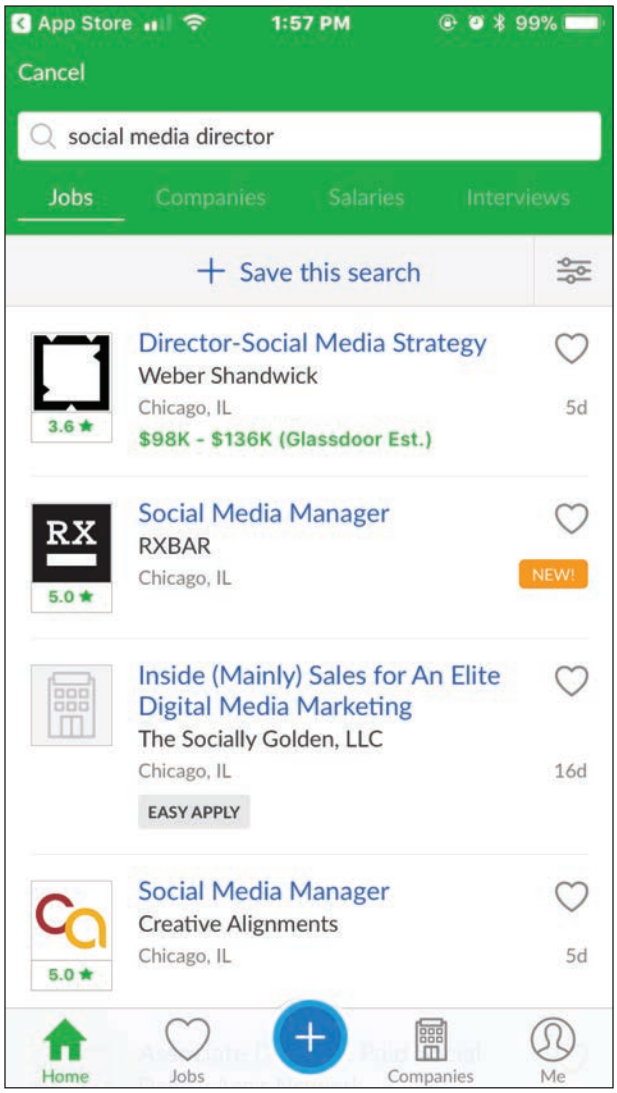
Website*	URL	Highlights
CollegeRecruiter	www.collegerecruiter.com	Focused on opportunities for graduates with fewer than three years of work experience
Monster	www.monster.com	One of the most popular job sites, with hundreds of thousands of openings, many from hard-to-find small companies; extensive collection of advice on the job-search process
CareerBuilder	www.careerbuilder.com	One of the largest job boards; affiliated with several hundred newspapers and job-related websites
USAJOBS	www.usajobs.gov	Official job-search site for the U.S. government, featuring openings for everything from economists to astronauts to border patrol agents
IMDiversity	imdiversity.com	Good resource on diversity in the workplace, with job postings from companies that have made a special commitment to promoting diversity
Dice.com	www.dice.com	One of the best sites for high-technology jobs
TopTechJobs.com	toptechjobs.com	Concentrates on jobs for IT specialists and engineers; also incorporates NetTemps .com for contractors and freelancers looking for short-term assignments
Internship Programs	internshipprograms.com	Posts listings from companies looking for interns in a wide variety of professions
SimplyHired Indeed	www.simplyhired.com www.indeed.com	Two specialized search engines that look for job postings on hundreds of websites worldwide; they find many postings that aren't listed on job board sites such as Monster

*Note: This list represents only a small fraction of the hundreds of job-posting sites and other resources available online; be sure to check with your college's career center for the latest information.

Sources: Individual websites, accessed 29 May 2019.

an important step in showing employers that you will be a good fit. Keep in mind that employers care about *your* past only to the extent that it will help you contribute to *their* future.

Customizing your résumé is not difficult if you have done your research. From your initial contact all the way through the interviewing process, in fact, you will have opportunities to impress recruiters by explaining how your general potential translates to the specific needs of the position.



Courtesy of Glassdoor

Figure 18.2 Mobile Job-Search Tools
Put your mobile phone or tablet to work in your job search, using some of the many employment apps now available.

TAKING THE INITIATIVE TO FIND OPPORTUNITIES

When it comes to finding the right opportunities for you, the easiest ways are not always the most productive ways. The major job boards such as Monster and classified services such as Craigslist have thousands of openings, but thousands of job seekers are looking at and applying for these same openings. Moreover, posting job openings on these sites is often a company's last resort, after it has exhausted other possibilities.

Don't hesitate to contact interesting companies even if they haven't advertised job openings to the public yet—they might be looking for somebody just like you.

To maximize your chances, take the initiative and go find opportunities. Identify the companies you want to work for and focus your efforts on them. Get in touch with their human resources departments (or individual managers, if possible), describe what you can offer the company, and ask to be considered if any opportunities come up.[5] Reach out to company representatives on social networks. Your message might appear right when a company is starting to look for someone but hasn't yet advertised the opening to the outside world.

BUILDING YOUR NETWORK

Networking is the process of making informal connections with mutually beneficial business contacts.

Networking is the process of making informal connections with mutually beneficial business contacts. Networking takes place wherever and whenever people talk: at industry functions, at social gatherings, at alumni reunions—and all over the internet, from

LinkedIn to Twitter to Facebook. In addition to making connections through social media tools, you might get yourself noticed by company recruiters.

Networking is more essential than ever because the majority of job openings are never advertised to the public. To avoid the time and expense of sifting through thousands of applications and the risk of hiring complete strangers, many companies start by asking their employees for recommendations—and these referrals are one of the most important sources of new employees.[6] The more people who know you, the better chance you have of being recommended for one of these hidden job openings.

Creative Ways to Build Your Network

Start building your network now—your classmates could turn out to be some of your most important business contacts.

Start building your network now. Your classmates could end up being some of your most valuable contacts, if not right away then possibly later in your career. Then branch out by identifying people with similar interests in your target professions, industries, and companies. Read news sites, blogs, and other online sources. Follow industry leaders and company executives on Twitter. Connect with people on LinkedIn and Facebook, particularly in groups dedicated to your career interests.

Participate in student business organizations, especially those with ties to professional organizations. Look for opportunities to visit *trade shows* in your target industries. Explore volunteering, too; you not only meet people but also demonstrate your ability to solve problems, manage projects, and lead others. You can do some good while creating a network for yourself.

Keys to Being a Valued Networker

Remember that networking is about people helping each other, not just about other people helping you. Pay close attention to networking etiquette:[7]

- Be polite in every exchange. Not only is this the professional way to behave, but people are more inclined to help those who are positive and respectful.
- Don't speak poorly of your current employer or any past employers. Doing so is off-putting to other people, and it harms your reputation.
- Respect other people's time. Don't inundate people with messages, questions, or requests for help.
- Stay away from politics and other volatile topics. Remember that you're building a business network, not a circle of friends.
- Follow through on your promises. If you agree to make an introduction or provide information, make sure you do so.
- Follow up after meeting people. If you meet someone with shared interests, send a brief message within a day or two to solidify the connection you've made.

Networking is a mutually beneficial activity, so look for opportunities to help others.

To become a valued network member, you need to be able to help others in some way. You may not have any influential contacts yet, but because you're researching industries and trends as part of your own job search, you probably have valuable information you can share via your online and offline networks. Or you might simply be able to connect one person with another who can help. The more you network, the more valuable you become in your network—and the more valuable your network becomes to you.

Finally, be aware that your online network reflects on who you are in the eyes of potential employers, so exercise some judgment in making connections and giving recommendations on LinkedIn.

SEEKING CAREER COUNSELING

Don't overlook the many resources available through your college's career center.

Your college's career center probably offers a wide variety of services, including individual counseling, interview practice, résumé help, job fairs, on-campus interviews, and job listings. You can also find career planning advice online. Many of the websites listed in Table 18.2 offer articles and online tests to help you choose a career path, identify essential skills, and prepare to enter the job market.

AVOIDING CAREER-SEARCH MISTAKES

Don't let a careless mistake knock you out of contention for a great job.

While you're making all these positive moves to show employers you will be a quality hire, take care to avoid simple blunders such as these that can derail a job search:

- Not catching mistakes in your résumé
- Misspelling the name of a manager you're writing to
- Showing up late for an interview
- Posting something unprofessional on social media
- Failing to complete application forms correctly
- Asking for information that you can easily find yourself on a company's website

Busy recruiters will seize on these errors to narrow the list of candidates they need to spend time on, so don't give them a reason to pass on your résumé.

Also, assume that every employer will conduct an online search on you because most companies now do so.[8] They want to know what your LinkedIn profile looks like and whether you've posted anything unprofessional on social media. If they don't like what they see or if what they see doesn't match what they read on your résumé, you probably won't be invited for an interview.[9]

DEVELOPING AS A PROFESSIONAL

Striving to Excel

Pros are good at what they do, and they never stop improving. No matter what your job might be at any given time—even if it is far from where you aspire to be—strive to perform at the highest possible level. Not only do you have an ethical obligation to give your employer and your customers your best effort, but excelling at each level in your career is also the best way to keep climbing up to new positions of responsibility. Plus, being good at what you do delivers a sense of satisfaction that is hard to beat.

In many jobs and in many industries, performing at a high level requires a commitment to continuous learning and improvement. The nature of the work often changes as markets and technologies evolve, and expectations of quality tend to increase over time as well. View this constant change as a positive thing, as a way to avoid stagnation and boredom.

Striving to excel can be a challenge when there is a mismatch between the job's requirements and your skills and knowledge. If you are underqualified for a job, you need to identify your weaknesses quickly and come up with a plan to address them. A supportive manager will help you identify these areas and encourage improvement through training or mentoring. Don't wait for a boss to tell you your work is subpar, however. If you know you're floundering, don't wait until you've failed to get help.

If you are overqualified for a job, it's easy to slip into a rut and eventually underperform simply because you aren't being challenged. However, current and future bosses aren't going to judge you on how well you performed relative to *your* needs and expectations; they're going to judge you on how well you performed relative to *the job's* requirements. Work with your boss to find ways to make your job more challenging if possible, or start looking for a better job if necessary, but be sure to maintain your level of performance until you can bring your responsibilities and talents into closer alignment.

CAREER APPLICATIONS

1. Should you ever try to sell yourself into a job for which you are not yet 100 percent qualified? Explain your answer.
2. Do you agree that you have an ethical obligation to excel at your job? Why or why not?

Planning Your Résumé

2 LEARNING OBJECTIVE
Explain the process of planning your résumé, including how to choose the best résumé organization.

Although you will create many messages during your career search, your résumé will be the most important document in this process. You will be able to use it directly in many instances, adapt it to a variety of uses such as an e-portfolio, and reuse pieces of it in social networking profiles and online application forms. Even if you apply to a company that doesn't request résumés, the process of developing your résumé will prepare you for interviewing and preemployment testing.

Check out the "Five-Minute Guide to Planning Your Résumé" at the end of the chapter.

Developing a résumé is one of those projects that really benefits from multiple sessions spread out over several days or weeks. You are trying to summarize a complex subject (yourself!) and present a compelling story to strangers in a brief document. Follow the three-step writing process (see Figure 18.3), and give yourself plenty of time.

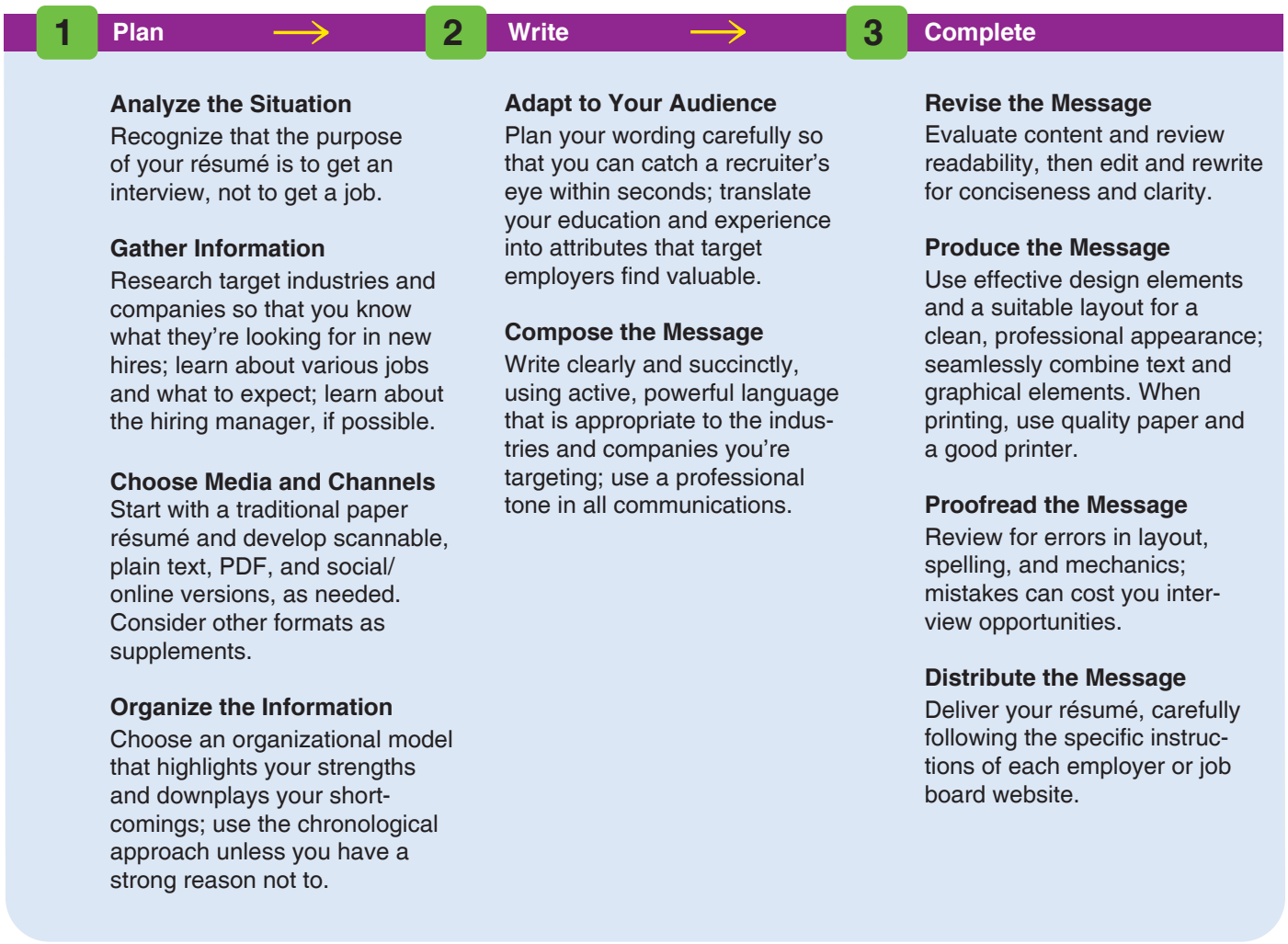


Figure 18.3 Three-Step Writing Process for Résumés
Following the three-step writing process will help you create a successful résumé in a short time. Remember to pay attention to the "you" attitude and presentation quality; your résumé will not get far into the recruiting process if it doesn't speak to audience needs or contains multiple mistakes.

Before you dive into your résumé, be aware that you will find a wide range of opinions regarding appropriate length, content, design, distribution methods, acceptable degrees of creativity, and whether writing a traditional résumé even makes sense in this age of online applications. For example, you may encounter a prospective employer that wants you to tweet your résumé or submit all the links that make up your online presence rather than submit a conventional résumé.[10] You may run across examples of effective résumés that were produced as infographics, interactive videos, simulated search engine results, puzzles, games, graphic novels—you name it, somebody has probably tried it.

When you hear conflicting advice or see trendy concepts that you might be tempted to try, remember the most important question in business communication: What is the most effective way to adapt your message to the individual needs of each member of your audience? An approach that is wildly successful with one company or in one industry could be a complete disaster in another industry. To forge your own successful path through this maze of information, get inside the heads of the people you are trying to reach—try to think the way they think—and then apply the principles of effective communication you are learning in this course.

You will see lots of ideas and some conflicting advice about résumés; use what you know about effective business communication to decide what is right for you.

ANALYZING YOUR PURPOSE AND AUDIENCE

Planning an effective résumé starts with understanding its true function—as a brief, persuasive business message intended to stimulate an employer's interest in meeting you and

Once you view your résumé as a persuasive business message, it's easier to decide what should and should not be in it.

TABLE 18.3 Fallacies and Facts About Résumés

Fallacy	Fact
The purpose of a résumé is to list all your skills and abilities.	The purpose of a résumé is to pique employer interest and generate an interview.
A good résumé will get you the job you want.	All a résumé can do is get you in the door.
Your résumé will always be read carefully and thoroughly.	In most cases, your résumé needs to make a positive impression within a few seconds; only then will someone read it in detail. Moreover, it will likely be screened by a computer looking for keywords first—and if it doesn't contain the right keywords, a human being may never see it.
The more good information you present about yourself in your résumé, the better, so stuff your résumé with every positive detail.	Recruiters don't need that much information about you at the initial screening stage, and they probably won't read it.

Source: Randall S. Hansen and Katharine Hansen, "What Résumé Format Is Best for You?" QuintCareers.com, accessed 7 August 2010, www.quintcareers.com.

learning more about you (see Table 18.3). In other words, the purpose of a résumé is not to get you a job but rather to get you an interview.[11]

As you conduct your research on various professions, industries, companies, and individual managers, you will have a better perspective on your target readers and their information needs. Learn as much as you can about the individuals who may be reading your résumé. Many professionals and managers are bloggers and Twitter users, and most are LinkedIn members, so you can learn more about them online even if you've never met them. Any bit of information can help you craft a more effective message.

Thanks to Twitter, LinkedIn, and other social media, you can often learn valuable details about individual managers in various companies.

By the way, if employers ask to see your "CV," they're referring to your *curriculum vitae*, the term used instead of *résumé* in academic professions and in many countries outside the United States. Résumés and CVs are essentially the same, although CVs can be much more detailed and contain personal information that is not included in a résumé.

GATHERING PERTINENT INFORMATION

If you haven't been building an employment portfolio thus far, you may need to do some research on yourself at this point. Gather all your pertinent work history, including the specific dates, duties, and accomplishments from any previous jobs you've held. Compile all your educational accomplishments, including formal degrees, training certificates, professional and technical certifications, academic awards, and scholarships. Also, gather information about school or volunteer activities that might be relevant to your job search, including offices you have held in any club or professional organization, presentations given, and online or print publications. You probably won't use every piece of information you come up with, but you'll want to have it at your fingertips.

SELECTING THE BEST MEDIA AND CHANNELS

You should expect to produce your résumé in several media and formats. "Producing Your Résumé" on page 535 discusses your options.

ORGANIZING YOUR RÉSUMÉ AROUND YOUR STRENGTHS

Although a résumé can be organized in a number of ways, most are some variation of chronological organization, functional organization, or a combination of the two. The right choice depends on your background and your goals.

The Chronological Résumé

The *chronological résumé*, which highlights your work history, is the most common format, but it might not be right for you at this stage in your career.

In a **chronological résumé**, the work experience section dominates and is placed immediately after your contact information and introductory statement (see Figure 18.6 on page 536 for an example). The chronological approach is the most common way to organize a résumé, and many employers prefer this format because it presents your professional history in a clear, easy-to-follow arrangement.[12] With its emphasis on your work history, however, it may not be the best choice if you have limited experience in the field you are

pursuing or if your work history doesn't show a linear career with a steady progression of increasing responsibility.[13]

The Functional Résumé

The *functional résumé* highlights your skills more than your work experience, but many employers are suspicious of this format because it can obscure gaps in your work history.

A **functional résumé**, sometimes called a *skills résumé*, emphasizes your skills and capabilities, identifying employers and academic experience in subordinate sections. This arrangement stresses individual areas of competence rather than job history. The functional approach has three benefits: (1) without having to read through job descriptions, employers can get an idea of what you can do for them; (2) you can emphasize earlier job experience through the skills you gained in those positions; and (3) you can deemphasize any lengthy unemployment or lack of career progress. However, you should be aware that because the functional résumé can obscure your work history, some employment professionals are suspicious of it.[14] Unless you have a strong reason to use this format, go with the chronological or combination format instead.

The Combination Résumé

If you don't have a lot of work history to show, consider a *combination résumé* to highlight your skills while still providing a chronological history of your employment.

A **combination résumé** meshes the skills focus of the functional format with the job history focus of the chronological format. Figures 18.4 (page 534) and 18.5 (page 535) show examples of combination résumés. The chief advantage of this format is that it allows you to highlight your capabilities and education when you don't have a long or steady employment history without raising concerns that you might be hiding something about your past.

As you look at sample résumés, you'll probably notice many variations on the three basic formats presented here. Study these other options in light of the effective communication principles you've learned in this course and the unique circumstances of your job search. If you find one that seems like the best fit for your unique situation, by all means use it.

ADDRESSING AREAS OF CONCERN

Here are some common issues that people have regarding their professional and personal histories with suggestions for handling them in a résumé, in your accompanying cover letter, or during an interview:

- **Slow career growth.** If you stayed in one position for many years, highlight ways in which you took on increasing responsibility, such as training new hires or filling in for your supervisor during vacations.
- **Frequent job changes.** If you've had several short-term jobs of a similar type, such as independent contracting and temporary assignments, you can group them under a single heading.[15] If past job positions were eliminated as a result of layoffs or mergers, find a subtle way to convey that information. Reasonable employers understand that many professionals have been forced to job hop by circumstances beyond their control. For both slow career growth and frequent job changes, bear in mind that these are relative perceptions that can vary by region and industry. For instance, a career history that would be viewed as stable in some fields and regions could be seen as stagnant in tech jobs in Silicon Valley, where job hopping is more common and sometimes viewed as a sign of growth.[16]
- **Gaps in work history.** Mention any relevant experience and education you gained during employment gaps, such as volunteer or community work. Also, consider the combination résumé format to emphasize your skills.
- **Inexperience.** Include related volunteer work, membership in professional groups, relevant coursework, and internships. Write a strong introductory statement that summarizes the value you can bring to an employer.
- **Overqualification.** Tone down your résumé by focusing on the experience and skills that relate most directly to the target position. If you are deeper into your career and are concerned about your age working against you, steer clear of phrases such as *decades of experience* and focus your presentation on your most recent and current accomplishments.

- **Job termination for cause.** Your résumé doesn't need to disclose that you were fired from a previous position, but if you are asked that on an application form or in an interview, you need to answer truthfully. Be prepared with an answer that illustrates how you learned from the experience and will be a positive asset to your next employer.[17]
- **Criminal record.** Employment laws related to criminal history vary by state, industry, and profession. If this affects you, you may want to consult your state's department of labor or advocacy organizations such as the National Employment Law Project (**www.nelp.org**). You don't necessarily need to disclose on your résumé if you have a criminal record, but most employers run background checks and at some point in the application process are likely to ask whether you have been convicted of a crime. Be prepared to discuss new skills you acquired and other positive changes you have made.[18]

Writing Your Résumé

3 LEARNING OBJECTIVE
Describe the tasks involved in writing your résumé, and list the sections to consider including in your résumé.

If you're uncomfortable writing your own résumé, consider trading with a classmate and writing each other's résumé.

With the necessary information and a good plan in hand, you're ready to begin writing. If you feel uncomfortable writing about yourself, you're not alone. Many people, even accomplished writers, can find it difficult to write their own résumés. If you get stuck, imagine you are somebody else, writing a résumé for this person called you. By "being your own client," you might find that the words and ideas flow more easily. You could also pair up with a classmate or friend who is writing a résumé and swap projects for a while. Working on each other's résumés might speed up the process for both of you.

KEEPING YOUR RÉSUMÉ HONEST

To combat résumé fraud, employers now use a variety of screening techniques to expose false or exaggerated information.

Your résumé is a promotional message, so you naturally want to portray yourself in the best possible light. However, you must avoid any temptation to stretch the truth. Not only is this the right thing to do, but résumé fraud has become so widespread that many employers are stepping up their efforts to confirm the information that candidates supply. These efforts include running background checks, verifying employment details, designing interview questions specifically to expose shaky information on résumés, and using standardized application forms that require candidates to provide specific details that might be missing from a résumé.[19] Chances are good that false information on a résumé will be exposed somewhere during the application and interview process. Even if a deceptive candidate makes it past these checks, he or she must then live with the fear of being caught somewhere down the line—people have been fired years into their jobs for falsifying their résumés.[20]

Express your talents and experience clearly and confidently, but don't inflate your accomplishments or do anything else to mislead employers. Stand out as a candidate with integrity.

ADAPTING YOUR RÉSUMÉ TO YOUR AUDIENCE

Plan to adapt your résumé to each job opening to show how your capabilities meet the demands and expectations of the position.

Plan to adapt your résumé to each job opening to show how your capabilities meet the demands and expectations of the position. For example, an in-house public relations (PR) department and an independent PR agency perform many of the same tasks, but the outside agency must also sell its services to multiple clients. Consequently, it needs employees who are skilled at attracting and keeping paying customers in addition to being skilled at PR. If you are applying for both in-house and agency PR jobs, you need to adapt your résumé for each of these audiences.

Pay close attention to any application instructions that an employer posts online. Companies may request that you include a specific detail on your résumé or other document, and they will check to see if you have demonstrated this attention to detail.

An essential step in adapting your résumé is using the same terminology as the employer uses to describe job responsibilities and professional accomplishments. In Figures 18.4 through 18.6 starting on page 534, you can see how the sample résumés do this, echoing

important terms and phrases from the job postings. With the widespread use of automated **applicant tracking systems** (**ATS**), matching your language to the employer's will help you get past the filters and algorithms these systems use to rank incoming résumés.

Applicant tracking systems (ATS) help employers process incoming applications by applying automated filtering and ranking rules.

If you are applying for business positions after military service or moving from one industry to another, you may need to "translate" your experience into the language of your target employers. For instance, military experience can help you develop many skills that are valuable in business, but military terminology can sound like a foreign language to people who aren't familiar with it. Isolate the important general concepts and present them in the business language your target employers use.

COMPOSING YOUR RÉSUMÉ

Draft your résumé using short, crisp phrases built around strong verbs and nouns.

Write your résumé using a clear and direct style. Use short, crisp phrases instead of whole sentences, and focus on what your reader needs to know. Avoid using the word *I*, which can sound both self-involved and repetitious by the time you outline all your skills and accomplishments. Instead, start your phrases with strong action verbs such as these:[21]

accomplished	coordinated	initiated	participated	set up
achieved	created	installed	performed	simplified
administered	demonstrated	introduced	planned	sparked
approved	developed	investigated	presented	streamlined
arranged	directed	launched	proposed	strengthened
assisted	established	maintained	raised	succeeded
assumed	explored	managed	recommended	supervised
budgeted	forecasted	motivated	reduced	systematized
chaired	generated	negotiated	reorganized	targeted
changed	identified	operated	resolved	trained
compiled	implemented	organized	saved	transformed
completed	improved	oversaw	served	upgraded

Whenever you can, quantify the results with carefully selected evidence that confirms your abilities:

Instead of This	Write an Active Statement That Shows Results
Responsible for developing a new system for tracking online service requests	Developed a new service-request system that reduced scheduling errors by 90 percent and improved customer satisfaction by 22 percent
Performed various social media functions	As community manager, directed all aspects of the company's social media program and increased stakeholder engagement by 30 percent
Have a solid record of acquiring new customers	Led the department in customer acquisition three years in a row
Member of special campus task force to resolve student problems with existing cafeteria assignments	Assisted in implementing new campus dining program that balances student needs with cafeteria capacity

Job-Specific Keywords

Include relevant keywords from job descriptions throughout your résumé and cover letter.

In addition to clear writing with specific examples, the specific words and phrases used throughout your résumé are critically important. Most résumés are now subjected to *keyword searches* in an applicant tracking system, in which a recruiter searches for résumés most likely to match the requirements of a particular job. Résumés that don't closely match the requirements may never be seen by a human reader, so it is essential to use the words and phrases that a recruiter is most likely to search on.

Identifying these keywords requires some research, but you can uncover many of them while you are researching various industries and companies. In particular, study

job descriptions carefully. In contrast to the action verbs that catch a human reader's attention, keywords that catch a computer's attention are usually nouns that describe the specific skills, attributes, and experiences an employer is looking for in a candidate. Keywords can include the business and technical terms associated with a specific profession, industry-specific jargon, names or types of products or systems used in a profession, job titles, and college degrees.[22] See "Intelligent Communication Technology: Make Friends with the Résumé Bots" for specific tips on using keywords in your employment communication.

Name and Contact Information

Be sure to provide complete and accurate contact information; mistakes in this section of the résumé are surprisingly common.

Your name and contact information constitute the heading of your résumé; include the following:

- Name
- Address (both permanent and temporary, if you're likely to move during the job-search process)
- Email address
- Phone number(s)
- The URL of your LinkedIn profile

Use a professional-sounding email address for business correspondence, such as *firstname.lastname@gmail.com*.

If the only email address you have is through your current employer, get a free personal email address from Gmail or a similar service. It's not fair to your current employer to use company resources for a job search, and doing so sends a bad signal to potential employers. Choose a straightforward address that includes your first and last names along with any additional numbers you might need to make it unique.

INTELLIGENT COMMUNICATION TECHNOLOGY

Make Friends with the Résumé Bots

When you apply for jobs at most large companies and an increasing number of midsize and small companies, your application materials will usually be assessed by an applicant tracking system before a human ever puts eyes on it. Much of this automated filtering focuses on keywords, so follow these tips for using keywords in your résumé and cover letter:

- Use the specific terminology that each employer uses in its job descriptions. This is another good reason for adapting your résumé to each job opening; various employers may use different terms to describe the same function or quality.
- Integrate keywords naturally. Work them into your introductory statement, your education section, your employment history, and any activities and achievements that you include.
- Without going overboard in a way that makes the writing awkward or unnatural, use as many relevant keywords as you can throughout your résumé and cover letter. Don't resort to *keyword stuffing*—trying to game the system by cramming every conceivable keyword into your résumé. Advanced AI systems such as Burning Glass (see page 517) analyze whether keywords are used naturally and in context.
- Be sure to cover the full range of hard and soft skills each employer is looking for. *Hard skills* are measurable, specific abilities, such as using spreadsheets, operating equipment, speaking a second language, designing websites, and so on. *Soft skills* are the less-tangible, interpersonal side of things—including communication, teamwork, leadership, and conflict resolution. Hard skills are easier to describe because they are specific, such as saying you are fluent in Spanish or have four years of experience designing mobile apps. Soft skills are more challenging to express in a convincing way, so look for ways to quantify them with details, such as "nominated for the company's leadership development program."

Getting assessed by a bot before you get the chance to make your case with a human can be unsettling, but follow these tips and you can make the bots your friends rather than your enemies.

WHAT'S YOUR TAKE?

1. What is a company likely to conclude about applicants if it believes they are trying to game the keyword analysis process?
2. Is it ethical for companies to use AI to evaluate job applicants? Why or why not?

Sources: Burning Glass Technologies, accessed 29 May 2019, www.burning-glass.com; Alison Doyle, "Resume Keywords and Tips for Using Them," *The Balance Careers*, 4 August 2017, www.thebalancecareers.com; Lily Martis, "Resume 101: How to Use Keywords," Monster, accessed 24 April 2018, www.monster.com.

Introductory Statement

You have three options for a brief introductory statement that follows your name and contact information:[23]

You can choose to open with a career objective, a qualifications summary, or a career summary.

- **Career objective.** A career objective identifies either a specific job you want to land or a general career track you would like to pursue. Some experts advise against including a career objective because it can categorize you so narrowly that you miss out on interesting opportunities and it is essentially about fulfilling your desires, not about meeting the employer's needs. In the past, most résumés included a career objective, but in recent years, more job seekers are using a qualifications summary or a career summary. If you have little or no work experience in your target profession, however, a career objective might be your best option. If you do opt for an objective, word it in a way that relates your aspirations to employer needs.

If you have a focused skill set but don't yet have a long career history, a qualifications summary is probably the best type of introductory statement for you.

- **Qualifications summary.** A qualifications summary offers a brief view of your key qualifications. The goal is to let a reader know within a few seconds what you can deliver. You can title this section generically as "Qualifications Summary" or "Summary of Qualifications," or, if you have one dominant qualification, you can use that as the title. Consider using a qualifications summary if you have one or more important qualifications but don't yet have a long career history. Also, if you haven't been working long but your college education has given you a dominant professional "theme," such as multimedia design or statistical analysis, you can craft a qualifications summary that highlights your educational preparedness.
- **Career summary.** A career summary offers a brief recap of your career with the goal of presenting increasing levels of responsibility and performance (see Figure 18.6 on page 536 for an example). A career summary is particularly good for people who have demonstrated the ability to take on increasing levels of responsibility in their chosen field and who want to continue in that field.

Whichever option you choose, make sure it includes the most essential keywords you identified in your research—and adapt these words and phrases to each job opportunity as needed.

Education

If you are early in your career, your education is probably your strongest selling point.

If you're still in college or have recently graduated, education is probably your strongest selling point. Present your educational background in depth, choosing facts that support your professional theme. Give this section a heading such as "Education," "Technical Training," or "Academic Preparation," as appropriate. Then, starting with the most recent, list the name and location of each school you have attended, the month and year of your graduation (say "anticipated graduation: ____" if you haven't graduated yet), your major and minor fields of study, significant skills and abilities you've developed in your coursework, and the degrees or certificates you've earned. Fine-tune your message by listing courses that are most relevant to each job opening, and indicate any scholarships, awards, or academic honors you've received. (Unless you are creating a temporary résumé to find part-time work while still in college, don't include your high school education.)

The education section should also include relevant training sponsored by business or government organizations. Include military training if is pertinent to your career goals, but be sure to translate any specialized language to terminology that business managers will understand.

Whether you list your grade point average (GPA) depends on where you are in your career and on the quality of your grades. Including it can work to your advantage if it is relatively high (3.5 or above on a 4.0 scale) and you have little or no professional experience. Note that whatever it is, you don't have to include your GPA unless a job posting asks for it. And after you've been working for a year or two, employers will be more interested in how you performed on the job than in college, so you should think about removing your GPA at that point.[24]

Work Experience, Skills, and Accomplishments

When you describe past job responsibilities, identify the skills and knowledge that you can apply to a future job.

This section can be called "Work Experience," "Professional Experience," or "Work and Volunteer Experience" if you have limited work experience and want to bolster that with volunteer experience. As with the education section, the work experience section should focus on your overall theme in a way that shows how your past can contribute to an employer's future. Use keywords to call attention to the skills you've developed on the job and to your ability to handle responsibility. Emphasize what you accomplished in each position, not just the generic responsibilities of the job.

List your jobs in reverse chronological order, starting with the most recent. Include military service and any internships and part-time or temporary jobs related to your career objective. Include the name and location of the employer, and if readers are unlikely to recognize the organization, briefly describe what it does. When you want to keep the name of your current employer confidential, you can identify the firm by industry only ("a large video game developer"). If an organization's name or location has changed since you worked there, state the current name and location and include the old information preceded by "formerly …" Before or after each job listing, state your job title and give the years you worked in the job; use the phrase "to present" to denote current employment. Indicate whether a job was part-time.

Devote the most space to jobs that are most recent and most closely related to your target position.

Devote the most space to the jobs that are most recent or most closely related to your target position. If you were personally responsible for something significant, be sure to mention it. Facts about your skills and accomplishments are the most important information you can give a prospective employer, so quantify them whenever possible.

As a general rule, employers will view any experience that occurred more than 10 or 15 years ago as less relevant, although there are certainly exceptions. Not including your earliest positions keeps your résumé from getting too cluttered and avoids emphasizing your age. However many years you do go back, be sure to include every job within that time frame so that you can show continuous work history (unless, of course, you were out of the workforce for part of that time).[25]

One helpful exercise is to write a 30-second "commercial" for each major skill you want to highlight. The commercial should offer proof that you really do possess the skill. For your résumé, distill the commercials down to brief phrases; you can use the more detailed proof statements in cover letters and as answers to interview questions.[26]

If you have several part-time, temporary, or entry-level jobs that don't relate to your career objective, you must use your best judgment when it comes to including or excluding them. Too many minor and irrelevant work details can clutter your résumé, particularly if you've been in the professional workforce for a few years. However, if you don't have a long employment history, including these jobs shows your ability and willingness to keep working.

Activities and Achievements

Include personal accomplishments only if they include special skills or qualities that are relevant to the jobs you're seeking.

You can use this optional section to highlight activities and achievements outside of a work or educational context—but only if they make you a more attractive job candidate. For example, traveling, studying, or working abroad and fluency in multiple languages could weigh in your favor with employers that do business internationally.

Because many employers are involved in their local communities, they tend to look positively on applicants who are active and concerned members of their communities as well. Consider including community service activities that suggest leadership, teamwork, communication skills, technical aptitude, or other valuable attributes.

You should generally avoid indicating membership or significant activity in religious or political organizations (unless, of course, you're applying to such an organization) because doing so might raise concerns among people with differing beliefs or affiliations. If you want to highlight skills you developed while involved with such a group, you can refer to it generically as a "not-for-profit organization."

Finally, if you have little or no job experience and not much to discuss outside of your education, you can indicate involvement in athletics or other organized student activities. Also consider mentioning publications, projects, and other accomplishments that required relevant business skills.

Personal Data

In most cases, your résumé should not include any personal data beyond the information described in the previous sections. When applying to U.S. companies, never include any of the following: physical characteristics, age, gender, marital status, sexual orientation, religious or political affiliations, race, national origin, salary history, reasons for leaving jobs, names of previous supervisors, names of references, Social Security number, or student ID number. Expectations differ in other countries, so research the job application process in specific countries if you need more information.

When you are applying to U.S. companies, your résumé should not include any personal data, such as age, marital status, physical description, or Social Security number.

References

For professional and managerial positions, nearly all employers ask for and check references, so you need to be prepared with a list of people who are willing to speak on your behalf.[27] (The availability of references is assumed, so you don't need to put "References available upon request" at the end of your résumé.)

Plan to gather three types of references as you begin your job search:[28]

Gather three types of references: professional references, personal references, and LinkedIn recommendations.

- *Professional references* are people who have had the opportunity to evaluate the knowledge and skills that you can bring to the jobs you are applying for. Professors and instructors, supervisors, colleagues, and even customers are all good candidates to approach for serving as professional references.
- Some employers may ask for *personal references*, people who are willing to vouch for your character. Good candidates here include people outside your family who have interacted with you in meaningful ways, including coaches, volunteer coordinators, and religious leaders. As appropriate, you may also ask any of your professional references to serve as personal references.
- To complete your LinkedIn profile, you will also need *LinkedIn recommendations* (see page 540).

For professional and personal references, you must ask permission before offering anyone's name as a reference. This conversation also gives you the chance to describe the opportunities you are pursuing, which helps your references frame what they have to say about you and lets you verify that each person is a good choice for you. If someone seems hesitant, think twice about including him or her in your list because you might get a lukewarm recommendation when an employer calls.

Reach out to the people you would like to use as references well before you need them. Describe the opportunities you are pursuing, include links to specific job postings if you have identified any, and provide any information (such as your résumé) that people might need to refresh their memories about you and your qualifications.

Prepare your reference sheet with your name and contact information at the top, using the same design and layout you use for your résumé. Then list the strongest three or four references you were able to get. Include each person's name, job title, organization, work address, preferred telephone number, and email address.

Figures 18.4 through 18.6 on the following pages show how a job applicant can put these guidelines to work in three job-search scenarios.

Completing Your Résumé

Completing your résumé involves revising it for optimum quality, producing it in the various forms and media you'll need, and proofreading it for any errors before distributing it or publishing it online.

4 LEARNING OBJECTIVE
Characterize the completing step for résumés, including the five most common formats in which you can produce a résumé.

REVISING YOUR RÉSUMÉ

Revising your résumé for clarity and conciseness is essential. Recruiters and hiring managers want to find key pieces of information about you, including your top skills, your current job, and your education, in a matter of seconds. Don't make them work to find or decode this information. Weed out minor details until your résumé is tight, clear, and focused.

Revise your résumé until it is as concise and clear as possible.

The Scenario

You are about to graduate and have found a job opening that is in your chosen field. You don't have any experience in this field, but the courses you've taken in pursuit of your degree have given you a solid academic foundation for this position.

The Opportunity

The job opening is for an associate market analyst with LivingSocial, the rapidly growing advertising and social commerce service that describes itself as "the online source for discovering valuable local experiences." (A market analyst researches markets to find potentially profitable business opportunities.)

The Communication Challenge

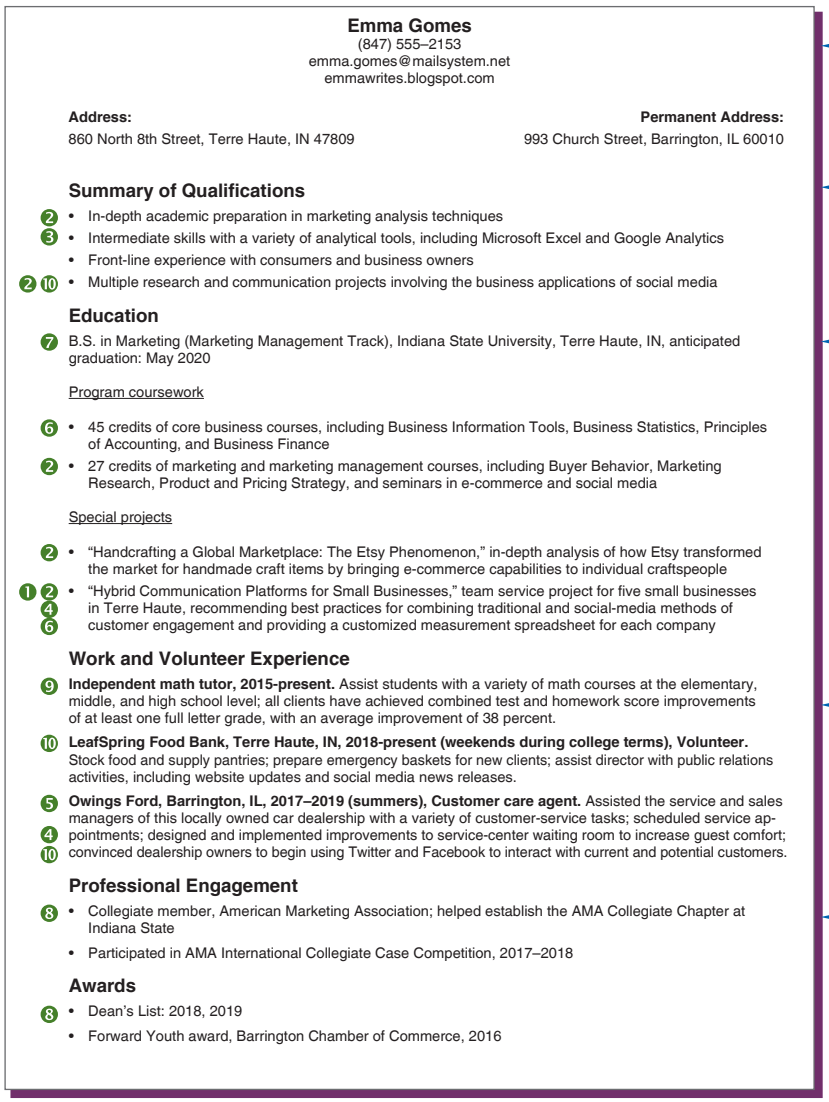
You don't have directly relevant experience as a market analyst, and you might be competing against people who do. Your education is your strongest selling point, so you need to show how your coursework relates to the position.

Don't let your lack of experience hold you back; the job posting makes it clear that this is an entry-level position. For example, the first bullet point in the job description says "Become an expert in market data . . .," and the required skills and experience section says that "Up to 2 years of experience with similar research and analysis is preferred." The important clues here are *become* (the company doesn't expect you to be an expert already) and *preferred* (experience would be great if you have it, but it's not required).

Keywords and Key Phrases

You study the job posting and highlight the following elements:

1. Working in a team environment
2. Research, including identifying trendy new businesses
3. Analyzing data using Microsoft Excel
4. Managing projects
5. Collaborating with technical experts and sales staff
6. Creating new tools to help maximize revenue and minimize risks
7. Bachelor's degree is required
8. Natural curiosity and desire to learn
9. Detail oriented
10. Hands-on experience with social media



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Summary of Qualifications

- (2) In-depth academic preparation in marketing analysis techniques
- (3) Intermediate skills with a variety of analytical tools, including Microsoft Excel and Google Analytics
- Front-line experience with consumers and business owners
- (2) (10) Multiple research and communication projects involving the business applications of social media

Education

(7) B.S. in Marketing (Marketing Management Track), Indiana State University, Terre Haute, IN, anticipated graduation: May 2020

Program coursework

- (6) 45 credits of core business courses, including Business Information Tools, Business Statistics, Principles of Accounting, and Business Finance
- (2) 27 credits of marketing and marketing management courses, including Buyer Behavior, Marketing Research, Product and Pricing Strategy, and seminars in e-commerce and social media

Special projects

- (2) "Handcrafting a Global Marketplace: The Etsy Phenomenon," in-depth analysis of how Etsy transformed the market for handmade craft items by bringing e-commerce capabilities to individual craftspeople
- (1) (2) (4) (6) "Hybrid Communication Platforms for Small Businesses," team service project for five small businesses in Terre Haute, recommending best practices for combining traditional and social-media methods of customer engagement and providing a customized measurement spreadsheet for each company

Work and Volunteer Experience

(9) **Independent math tutor, 2015-present.** Assist students with a variety of math courses at the elementary, middle, and high school level; all clients have achieved combined test and homework score improvements of at least one full letter grade, with an average improvement of 38 percent.

(10) **LeafSpring Food Bank, Terre Haute, IN, 2018-present (weekends during college terms), Volunteer.** Stock food and supply pantries; prepare emergency baskets for new clients; assist director with public relations activities, including website updates and social media news releases.

(5) **Owings Ford, Barrington, IL, 2017–2019 (summers), Customer care agent.** Assisted the service and sales managers of this locally owned car dealership with a variety of customer-service tasks; scheduled service appointments; designed and implemented improvements to service-center waiting room to increase guest comfort; convinced dealership owners to begin using Twitter and Facebook to interact with current and potential customers. (4) (10)

Professional Engagement

- (8) Collegiate member, American Marketing Association; helped establish the AMA Collegiate Chapter at Indiana State
- Participated in AMA International Collegiate Case Competition, 2017–2018

Awards

- (8) Dean's List: 2018, 2019
- Forward Youth award, Barrington Chamber of Commerce, 2016

Gomes includes phone and email contacts along with a blog that features academic-oriented writing.

Using a summary of qualifications for her opening statement lets her target the résumé and highlight her most compelling attributes.

Her education is a much stronger selling point than her work experience, so she goes into some detail—carefully selecting course names and project descriptions to echo the language of the job description.

She adjusts the descriptions and accomplishments of each role to highlight the aspects of her work and volunteer experience that are relevant to the position.

The final sections highlight activities and awards that reflect her interest in marketing and her desire to improve her skills.

Notice how Gomes adapts her résumé to "mirror" the keywords and phrases from the job posting:

(1) Offers concrete evidence of teamwork (rather than just calling herself a "team player," for example)
(2) Emphasizes research skills and experience in multiple instances
(3) Calls out Microsoft Excel, as well as Google Analytics, a key online tool for measuring activity on websites
(4) Indicates the ability to plan and carry out projects, even if she doesn't have formal project management experience
(5) Indicates some experience working in a supportive or collaborative role with technical experts and sales specialists (the content of the work doesn't translate to the new job, but the concept does)
(6) Suggests the ability to work with new analytical tools
(7) Displays her B.S. degree prominently
(8) Demonstrates a desire to learn and to expand her skills
(9) Tracking the progress of her tutoring clients is strong evidence of a detail-oriented worker—not to mention someone who cares about results and the quality of her work
(10) Lists business-oriented experience with Facebook, Twitter, and other social media

Figure 18.4 Crafting Your Résumé, Scenario 1: Positioning Yourself for an Ideal Opportunity
Even for an ideal job-search scenario, where your academic and professional experiences and interests closely match the parameters of the job opening, you still need to adapt your résumé content carefully to "echo" the specific language of the job description.[29]

If your employment history is brief, keep your printable résumé to one page; you can expand on this in your LinkedIn profile and other online platforms.

The ideal length of your résumé depends on the depth of your experience and the level of the positions for which you are applying. As a general guideline, if you have fewer than five years of professional experience, keep your conventional résumé to one page. For online résumé formats such as LinkedIn, you can always provide links to additional information. If you have more experience and are applying for a higher-level position, you may need to prepare a somewhat longer résumé.[30] For highly technical positions, longer résumés are often the norm as well because the qualifications for such jobs can require more description.

The Scenario

You are about to graduate but can't find job openings in the field you'd like to enter. However, you have found an opening that is in a related field, and it would give you the chance to get some valuable work experience.

The Opportunity

The job opening is for a seller support associate with Amazon, the online retail giant. Employees in this position work with merchants that sell products through the Amazon e-commerce system to make sure merchants are successful. In essence, it is a customer service job, but directed at these merchants, not the consumers who buy on Amazon.

The Communication Challenge

This isn't the job you ultimately want, but it is a great opportunity with a well-known company.You note that the position does not require a college degree, so in that sense you might be a bit overqualified. However, you also see a strong overlap between your education and the responsibilities and required skills of the job, so be sure to highlight those.

Keywords and Key Phrases

You study the job posting and highlight the following elements:

1. Be able to predict and respond to merchant needs; good business sense with the ability to appreciate the needs of a wide variety of companies
2. Strong written and oral communication skills
3. High degree of professionalism
4. Self-starter with good time management skills
5. Logically analyze problems and devise solutions
6. Comfortable with computer-based tools, including Microsoft Excel
7. Desire to expand business and technical skills
8. Customer service experience
9. Collaborate with fellow team members to resolve difficult situations
10. Record of high performance regarding quality of work and personal productivity

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Summary of Qualifications

- (8) Front-line customer service experience with consumers and business owners
- Strong business sense based on work experience and academic preparation
- (6) Intermediate skills with a variety of software tools, including Microsoft Excel and Google Analytics
- (10) Record of quality work in both business and academic settings

Education

B.S. in Marketing (Marketing Management Track), Indiana State University, Terre Haute, IN, expected graduation May 2020

Program coursework

- (6) 45 credits of core business courses, including Business Information Tools, Business Statistics, Principles of Accounting, and Business Finance
- (1) 27 credits of marketing and marketing management courses, including Marketing Fundamentals, Buyer Behavior, Marketing Research, Retail Strategies, and seminars in e–commerce and social media

Special projects

- (1 2) "Handcrafting a Global Marketplace: The Etsy Phenomenon," in-depth analysis of how the Etsy e-commerce platform helps craftspeople and artisans become more successful merchants
- (1 2 9) "Hybrid Communication Platforms for Small Businesses," team service project for five small businesses in Terre Haute, recommending best practices for combining traditional and social–media methods of customer engagement and providing a customized measurement spreadsheet for each company

Work and Volunteer Experience

(3 4 10) **Independent math tutor, 2015-present.** Assist students with a variety of math courses at the elementary, middle, and high school level; all clients have achieved combined test and homework score improvements of at least one full letter grade, with an average improvement of 38 percent.

(2) **LeafSpring Food Bank, Terre Haute, IN, 2018-present (weekends during college terms), Volunteer.** Stock food and supply pantries; prepare emergency baskets for new clients; assist director with public relations activities, including website updates and social media news releases.

(8 5) **Owings Ford, Barrington, IL, 2017–2019 (summers), Customer care agent.** Assisted the service and sales managers of this locally owned car dealership with a variety of customer-service tasks; scheduled service appointments; designed and implemented improvements to service-center waiting room to increase guest comfort; convinced dealership owners to begin using Twitter and Facebook to interact with current and potential customers.

Professional Engagement

- (7) Collegiate member, American Marketing Association; helped establish the AMA Collegiate Chapter at Indiana State
- Participated in AMA International Collegiate Case Competition, 2017–2018

Awards

- (3 4 10) Dean's List: 2018, 2019
- (1) Forward Youth award, Barrington Chamber of Commerce, 2016

Gomes modified her summary of qualifications to increase emphasis on customer service.

She adjusts the selection of highlighted courses to reflect the retail and e-commerce aspects of this particular job opening.

She adjusts the wording of this Etsy project description to closely mirror what Amazon is—an e-commerce platform serving a multitude of independent merchants.

She provides more detail regarding her customer support experience.

The final sections are still relevant to this job opening, so she leaves them unchanged.

Notice how Gomes adapts her résumé to "mirror" the keywords and phrases from the job posting:

1. Suggests strong awareness of the needs of various businesses
2. Examples of experience with written business communication; she can demonstrate oral communication skills during phone, video, or in-person interviews
3. Results-oriented approach to tutoring business suggests high degree of professionalism, as do the two awards
4. The ability to work successfully as an independent tutor while attending high school and college is strong evidence of self-motivation and good time management
5. Indicates ability to understand problems and design solutions
6. Suggests the ability to work with a variety of software tools
7. Demonstrates a desire to learn and to expand her skills
8. Highlights customer service experience
9. Offers concrete evidence of teamwork (rather than just calling herself a "team player," for example)
10. Tracking the progress of her tutoring clients is strong evidence of someone who cares about results and the quality of her work; Dean's List awards also suggest quality of work; record of working while attending high school and college suggests strong productivity

Figure 18.5 Crafting Your Résumé, Scenario 2: Repositioning Yourself for Available Opportunities
If you can't find an ideal job opening, you'll need to adjust your plans and adapt your résumé to the openings that are available. Look for opportunities that meet your near-term financial needs while giving you the chance to expand your skill set so that you'll be even more prepared when an ideal opportunity does come along.[31]

PRODUCING YOUR RÉSUMÉ

Producing your résumé starts with choosing a design strategy and then creating your résumé in as many formats as you'll need.

Choosing a Design Strategy for Your Résumé

You'll find a wide range of résumé designs in use today, from text-only documents that follow a conventional layout to full-color infographics to multimedia presentations. As

The most important consideration in résumé design is that it be easy to read and easy to skim quickly.

The Scenario

Moving forward from Figures 18.4 and 18.5, let's assume you have worked in both those positions, first for two years as a seller support associate at Amazon and since then as an associate market analyst at LivingSocial. You believe you are now ready for a bigger challenge, and the question is how to adapt your résumé for a higher-level position now that you have some experience in your chosen field. (Some of the details from the earlier résumés have been modified to accommodate this example.)

The Opportunity

The job opening is for a senior strategy analyst for Nordstrom. The position is similar in concept to the position at LivingSocial, but at a higher level and with more responsibility.

The Communication Challenge

This job is an important step up; a senior strategy analyst is expected to conduct in-depth financial analysis of business opportunities and make recommendations regarding strategy changes, merchandising partnerships with other companies, and important decisions.

You worked with a wide variety of retailers in your Amazon and LivingSocial jobs, including a number of fashion retailers, but you haven't worked directly in fashion retailing yourself.

Bottom line: You can bring a good set of skills to this position, but your financial analysis skills and retailing insights might not be readily apparent, so you'll need to play those up.

Keywords and Key Phrases

You study the job posting and highlight the following elements:

1. Provide research and analysis to guide major business strategy decisions
2. Communicate across business units and departments within Nordstrom
3. Familiar with retail analytics
4. Knowledge of fashion retailing
5. Qualitative and quantitative analysis
6. Project management
7. Strong communication skills
8. Bachelor's required; MBA preferred
9. Advanced skills in financial and statistical modeling
10. Proficient in PowerPoint and Excel

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Market and Strategy Analyst

- (1)(3) Five years of experience in local and online retailing, with three years of focus on market opportunity analysis
- (4) Strong business sense developed through more than 60 marketing programs across a range of retail sectors, including hospitality, entertainment, and fashion
- (1)(5) Recognized by senior management for ability to make sound judgment calls in situations with incomplete or conflicting data
- (2)(6) Adept at coordinating research projects and marketing initiatives across organizational boundaries and balancing the interests of multiple stakeholders
- (9)(10) Advanced skills with leading analysis and communication tools, including Excel, PowerPoint, and Google Analytics

Professional Experience

(1)(4)(7)(3)(5)(7) **LivingSocial, Seattle, WA (July 2017–present), Associate market analyst.** Analyzed assigned markets for such factors as consumer demand, merchandising opportunities, and seller performance; designed, launched, and managed marketing initiatives in 27 retailing categories, including fashions and accessories; met or exceeded profit targets on 90 percent of all marketing initiatives; appointed team lead/trainer in recognition of strong quantitative and qualitative analysis skills; utilized both established and emerging social media tools and helped business partners use these communication platforms to increase consumer engagement in local markets.

(4)(7)(3) **Amazon, Seattle, WA (July 2015–June 2017), Seller support associate.** Worked with more than 300 product vendors, including many in the fashion and accessories sectors, to assure profitable retailing activities on the Amazon e-commerce platform; resolved vendor issues related to e-commerce operations, pricing, and consumer communication; anticipated potential vendor challenges and assisted in the development of more than a dozen new selling tools that improved vendor profitability while reducing Amazon's vendor support costs by nearly 15 percent.

Education

(8)(1)(9) **Evening MBA program, University of Washington, Seattle, WA; anticipated graduation: May 2021.** Broad-based program combining financial reporting, marketing strategy, competitive strategy, and supply chain management with individual emphasis on quantitative methods, financial analysis, and marketing decision models.

(9) **B.S. in Marketing (Marketing Management Track), Indiana State University, Terre Haute, IN, May 2015.** Comprehensive coursework in business fundamentals, accounting and finance, marketing fundamentals, retailing, and consumer communications.

Professional Engagement

- Member, American Marketing Association
- Member, International Social Media Association
- (4) Active in National Retail Federation and Retail Advertising & Marketing Association

Awards

- LivingSocial Top Ten Deals (monthly employee achievement award for designing the most profitable couponing deals); awarded seven times, 2017–2019
- Social Commerce Network's Social Commerce Innovators: 30 Under 30; 2018

Gomes stays with a summary of qualifications as her opening statement but gives it a new title to reflect her experience and to focus on her career path as a market analyst.

Work experience is now her key selling point, so she shifts to a conventional chronological résumé that puts employment ahead of education. She also removes the part-time jobs she had during high school and college.

She updates the education section with a listing for the MBA program she has started (selecting points of emphasis relevant to the job opening) and reduces the amount of detail about her undergraduate degree.

She updates the professional engagement and awards sections with timely and relevant information.

Notice how Gomes adapts her résumé to "mirror" the keywords and phrases from the job posting:

(1) Highlights her experience in market and business analysis and her continuing education in this area
(2) Mentions skill at coordinating cross-functional projects
(3) Lists experiences that relate to the collection and analysis of retail data
(4) Emphasizes the work she has done with fashion-related retailing and retailing in general
(5) Identifies experience and education that relates to quantitative and qualitative analysis (this point overlaps #1 and #3 to a degree)
(6) Mentions project management experience
(7) Lists areas that suggest effective communication skills
(8) Lists education, with emphasis on coursework that relates most directly to the job posting
(9) Mentions work experience and educational background related to these topics
(10) Includes these programs in the list of software tools she uses

Figure 18.6 Crafting Your Résumé, Scenario 3: Positioning Yourself for More Responsibility
When you have a few years of experience under your belt, your résumé strategy should shift to emphasize work history and accomplishments. Here is how Emma Gomes might reshape her résumé if she had held the two jobs described in Figures 18.4 and 18.5 and is now ready for a bigger challenge. For an application letter that could accompany this résumé, see Figure 19.3 on page 556.[32]

with every type of business message, keep your audience, your goals, and your resources in mind. Above all else, your résumé must be easy to read and easy for recruiters to skim quickly.[33]

Don't pick a résumé style just because it's trendy or different; make sure it works for your specific needs.

Don't choose a style just because it seems trendy or flashy or different. For example, you can find some eye-catching infographic résumés online, but many of those are created by graphic designers applying for visually oriented jobs in advertising, fashion, web design, and other areas in which graphic design skills are a must. In other words, the intended audience expects an applicant to have design skills, and the résumé is a good opportunity to demonstrate those. In contrast, a colorful, graphically intense résumé might

just look odd to recruiters in finance, engineering, or other professions—and it's almost guaranteed to get rejected by an ATS.

The sample résumés in Figures 18.4 through 18.6 use a classic, conservative design that will serve you well for most business opportunities. Notice how they feature simplicity, an easy-to-read layout, effective use of white space, and clear typefaces. Recruiters can pick out the key pieces of information in a matter of seconds. (If an employer requests a *scannable résumé*, search online for instructions on how to create this simple, no-frills design.)

With any résumé design, make sure that readers can find essential information in a matter of seconds.

You can certainly enhance your résumé beyond this style, but do so carefully and always with an eye on what will help the reader and avoid confusing an applicant tracking system. Make subheadings easy to find and easy to read. Avoid dense blocks of text, and use lists to itemize your most important qualifications. Color is not necessary by any means, but if you add color, make it subtle and sophisticated. Above all, don't make the reader work. Your résumé should be a high-efficiency information-delivery system, not a treasure hunt.

Be prepared to produce versions of your résumé in multiple formats.

Depending on the companies you apply to, you might want to produce your résumé in as many as five formats (all are explained in the following sections):

- Conventional résumé
- Plain-text file
- Microsoft Word file
- Online résumé
- PDF file

Unfortunately, no single format or medium will work for all situations, and employer expectations continue to change as technology evolves. Find out what each employer or job website expects, and provide your résumé in that specific format.

Considering Photos, Videos, Presentations, and Infographics

In most cases, it's best not to include photos with résumés that you send to employers or post on job websites.

As you produce your résumé in various formats, you will encounter the question of whether to include a photograph of yourself on or with your résumé. For print or digital documents that you will be submitting to employers or job websites, the safest advice is to avoid photos. The reason is that seeing visual cues of the age, ethnicity, and gender of candidates early in the selection process exposes employers to complaints of discriminatory hiring practices. In fact, some employers won't even look at résumés that include photos, and some applicant tracking systems automatically discard résumés with any extra files.[34] However, photographs are acceptable and expected for LinkedIn and other online formats where you are not actively submitting a résumé to an employer.

Some applicants create PowerPoint or Prezi presentations, videos, or infographics to supplement a conventional résumé. These other formats have the appealing options of flexibility and multimedia capabilities. For instance, you can present a menu of choices on the opening screen and allow viewers to click through to sections of interest. (Note that most of the things you can accomplish with a presentation can be done with an online résumé, which is probably more convenient for most readers.)

A video résumé can be a compelling supplement as well, but be aware that some employment law experts advise employers not to view videos, at least not until after candidates have been evaluated solely on their credentials. The reason for this caution is the same as with photographs. In addition, videos are more cumbersome to evaluate than printed or digital résumés, and some recruiters refuse to watch them.[35] Not all companies share this concern over videos, so you'll have to research their individual preferences. In fact, the online retailer Zappos encourages "video cover letters" from interested candidates.[36]

An infographic résumé attempts to convey a person's career development and skill set graphically through a visual metaphor such as a timeline or subway map or as a poster with an array of individual elements. A well-designed infographic could be an intriguing element of the job-search package for candidates in certain situations and professions because it can definitely stand out from traditional résumés and can show a high level of skill in visual communication. However, infographics are likely to be incompatible with applicant tracking systems and with the screening habits of most recruiters, so don't submit an infographic when a company expects a conventional résumé. In virtually every situation, an infographic should complement a conventional résumé, not replace it.

Producing a Conventional Printed Résumé

Even though most of your application activity will take place online, having a copy of a conventional printed résumé is important for taking to job fairs, interviews, and other events. Many employers expect you to bring a printed résumé to the interview, even if you applied online. The résumé can serve as a note-taking form or discussion guide, and it is tangible evidence of your attention to professionalism and detail.[37] When printing a résumé, choose a heavier, higher-quality paper designed specifically for résumés and other important documents. White or slightly off-white is the best color choice. Avoid papers with borders or backgrounds.

Use high-quality paper when printing your résumé.

Creating a Plain-Text File of Your Résumé

A plain-text version of your résumé is simply a computer file without any of the formatting that you typically apply using word-processing software.

A *plain-text file* (sometimes known as an ASCII text file) is a digital version of your résumé that has no font formatting, no bullet symbols, no colors, no lines or boxes, and no other special formatting. The plain-text version can be used in two ways. First, you can include it in the body of an email message, for employers who want email delivery but don't want file attachments. Second, you can copy and paste the sections into the application forms on an employer's website.

Verify the plain-text file that you create with word-processing apps; it might need a few manual adjustments using a text editor such as Notepad.

A plain-text version is easy to create with your word processor. Start with the file you used to create your résumé, select the "Save As" choice to save it as "plain text" or whichever similarly labeled option your software has, and verify the result using a basic text editor (such as Microsoft Notepad). If necessary, reformat the page manually, moving text and inserting space as needed. For simplicity's sake, left-justify all your headings rather than trying to center them manually.

Creating a Word File of Your Résumé

Some employers and websites want your résumé in Microsoft Word format; make sure your computer is free from viruses before you upload the file.

Some employers and job websites will ask you to upload a Microsoft Word file or attach it to an email message. This method of transferring information preserves the design and layout of your résumé and saves you the trouble of creating a plain-text version. Before you submit a file to anyone, make sure your computer is free of viruses. Infecting a potential employer's computer will not make a good first impression.

Creating a PDF Version of Your Résumé

Creating a PDF file is a simple procedure, depending on the software you have. In newer versions of Microsoft Word, for example, you can save a document directly as a PDF file. The advantages of creating PDFs are that you preserve the formatting of your résumé (unlike pasting plain text into an email message) and that you create a file type that is less vulnerable to viruses than word-processor files.

Creating an Online Résumé

You have various options for posting a résumé online, but your LinkedIn profile is the most important of these.

A variety of online résumé formats, variously referred to as *e-portfolios, interactive résumés*, or *social media résumés*, provide the opportunity to create a dynamic multimedia presentation of your qualifications. You can expand on the information contained in your basic résumé with links to projects, publications, screencasts, online videos, course lists, blogs, social networking profiles, and other elements that give employers a more complete picture of who you are and what you can offer. For most job hunters, though, the most important online résumé you can create is your LinkedIn profile (see page 540).

PROOFREADING YOUR RÉSUMÉ

Your résumé needs to be *perfect*, so proofread it thoroughly and ask several other people to verify it, too.

Employers view your résumé as a concrete example of your attention to quality and detail. Your résumé doesn't need to be good or pretty good—it needs to be *perfect*. A human reader will view errors as signs of carelessness, and an applicant tracking system can be programmed to automatically reject résumés with spelling and grammatical errors.[38]

Your résumé is one of the most important documents you'll ever write, so don't rush or cut corners when it comes to proofreading. Check all headings and lists for clarity and

parallelism, and be sure your grammar, spelling, and punctuation are correct. Double-check all dates, phone numbers, email addresses, and other essential data. Ask at least three other people to read it, too. As the creator of the material, you could stare at a mistake for weeks and not see it.

DISTRIBUTING YOUR RÉSUMÉ

How you distribute your résumé depends on the number of employers you target and their preferences for receiving résumés. Employers usually list their requirements on their websites, so verify this information and follow it carefully. Beyond that, here are some general distribution tips:

When distributing your résumé, pay close attention to the specific instructions provided by each employer, job website, or other recipient.

- **Mailing printed résumés.** Take some care with the packaging. Spend a few extra cents to mail your documents in a flat 9 × 12 envelope, or better yet, use a Priority Mail flat-rate envelope, which gives you a sturdy cardboard mailer and faster delivery for just a few more dollars.
- **Emailing your résumé.** Some employers want applicants to include the text of their résumés in the body of an email message; others prefer an attached Microsoft Word or PDF file. If you have a reference number or a job ad number, include it in the subject line of your email message.
- **Submitting your résumé to an employer's website.** Many employers, including most large companies, now prefer or require applicants to submit their résumés online. In some instances, you will be asked to upload a complete file. In others, you will need to copy and paste sections of your résumé into individual boxes in an online application form.
- **Posting your résumé on job websites.** Before you upload your résumé to any site, learn about its privacy protection. Some sites allow you to specify levels of confidentiality, such as letting employers search your qualifications without seeing your personal contact information or preventing your current employer from seeing your résumé. You can also set your résumé to *private* on sites such as Monster so that you can use it to apply for jobs you find there but it won't be viewable or searchable by anyone.[39] To protect yourself from identity thieves and spammers, don't post your résumé to any website that doesn't give you the option of restricting the display of your personal information.

Don't post a résumé on any public website unless you understand its privacy and security policies.

For a quick summary of the steps to take when planning, writing, and completing your résumé, refer to "Checklist: Writing an Effective Résumé."

CHECKLIST ✓ Writing an Effective Résumé

A. Plan your résumé.
- Analyze your purpose and audience carefully to make sure your message meets employers' needs.
- Gather pertinent information about your target companies.
- Select the required media types by researching the preferences of each employer.
- Organize your résumé around your strengths, choosing the chronological, functional, or combination structure. (Be careful about using the functional structure.)

B. Write your résumé.
- Keep your résumé honest.
- Adapt your résumé to your audience to highlight the qualifications each employer is looking for.
- Choose a career objective, qualifications summary, or career summary as your introductory statement—and make it concise, concrete, and reader-focused.
- Use powerful language to convey your name and contact information, introductory statement, education, work experience, skills, work or school accomplishments, and activities and achievements.

C. Complete your résumé.
- Revise your résumé until it is clear, concise, compelling—and perfect.
- Produce your résumé in all the formats you might need: traditional printed résumé, plain-text file, Microsoft Word file, PDF, or online.
- Proofread your résumé to make sure it is absolutely perfect.
- Distribute your résumé using the means that each employer prefers.

Building an Effective LinkedIn Profile

5 LEARNING OBJECTIVE
Identify nine tips for creating a successful LinkedIn profile.

Your LinkedIn profile is a great opportunity to showcase projects, awards, and multimedia elements.

LinkedIn (**www.linkedin.com**) is the most important website to incorporate in your job search. Employment recruiters search LinkedIn for candidates far more than any other social network, many employers now want to see your LinkedIn profile rather than a conventional résumé, and companies doing background checks on you are almost certain to look for your LinkedIn profile.[40]

You can think of LinkedIn as a "socially networked multimedia résumé." An effective LinkedIn profile includes all the information from your conventional résumé plus some additional features that help you present yourself in a compelling way to potential employers. Here are nine tips for building an effective profile:[41]

1. **Photo.** Add a photo that says "professional" without being overly formal. You don't need to hire a professional photographer, but the photo needs to be clear and lit well enough so that your face isn't in shadow. Stand against a visually "quiet" background that won't distract viewers, dress appropriately for the jobs you are pursuing, and remember to smile.
2. **Headline.** Write a headline that expresses who you are or aspire to be as a professional, such as "Data science major ready to make data come alive through leading-edge techniques in data mining, visualization, and AI." Include keywords that target employers are likely to be searching for. As with other text fields on LinkedIn, you have a limited number of characters to work with here, so focus on your most valuable attributes. Erica Baker, for instance, establishes herself as a technically astute, creative problem-solver with her LinkedIn headline: "I like to slay big problems and puzzles. My weapons of choice are logic, data, curiosity, and code."[42] If you have been completing the Build Your Career activities in previous chapters, use your headline/tagline here.
3. **Summary.** Write a summary that captures where you are and where you are going. Imagine that you are talking to a hiring manager in a personal and conversational tone, telling the story of where you've been and where you would like to go—but expressed in terms of meeting an employer's business needs. Highlight your job experience, education, skills, accomplishments, target industry, and career direction. Unlike the introductory statement on your conventional résumé, which you can fine-tune for every job opportunity, your LinkedIn summary offers a more general picture of who you are as a professional. Be sure to work in as many of the keywords from your research as you can, while keeping the style natural. Employers can use a variety of search tools to find candidates, and they'll look for these keywords.
4. **Experience.** Fill out the experience section using the material from your conventional résumé. Make sure the details of your employment match your résumé, as employers are likely to cross-check. However, you can expand beyond those basics, such as by including links to photos and videos of work-related accomplishments.
5. **Recommendations.** Ask for recommendations from people you know on LinkedIn. You may have a limited number of connections as you start out, but as your network expands, you'll have more people to ask. A great way to get recommendations is to give them to the people in your network.
6. **Featured skills.** List your top skills and areas of expertise. As you expand your network, endorse the skills of people you know; many users will endorse your skills in return.
7. **Education.** Make sure your educational listing is complete and matches the information on your conventional résumé.
8. **Accomplishments.** LinkedIn offers a variety of categories that let you highlight academic achievements, special projects, publications, professional certifications, important coursework, honors, patents, and more. If you don't have an extensive work history, use this section to feature academic projects and other accomplishments that demonstrate your skills.

MOBILE APP
Stay in touch with your professional network with the **LinkedIn** app.

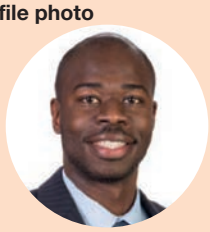
9. **Volunteer experience and causes.** Add volunteering activities and charitable organizations that you support.

Figure 18.7 offers a helpful summary of these tips, and Figure 18.8 on the next page shows an example of an effective profile. For the most current instructions on performing these tasks, visit the LinkedIn Help center at **www.linkedin.com/help/linkedin**. Remember that the more robust you make your profile, the better your chances are of catching the eye of company recruiters.

In addition to completing your profile, search for and join groups that focus on your professional interests. This is a great way to expand your network and learn from leaders in your field. Be sure to review the privacy and communication settings as well. The options are extensive, so take time to consider each one carefully.

LinkedIn groups are an opportunity to expand your network and learn from experienced professionals.

Profile photo



Flashon Studio/123RF

- Strike a friendly pose that's not too formal or too casual.
- Make sure your face isn't in shadow.
- Stand against a visually quiet background that doesn't compete with your image.
- Don't wear dark glasses.
- Dress appropriately for target jobs in your chosen profession.

Headline

- Express who you are or aspire to be as a professional.
- Include keywords that target employers are likely to be searching for.
- Focus on your most valuable attributes to make best use of the limited space available.

Summary

- Capture where you are and where you are going—in terms of how you can contribute to a company.
- Imagine you are talking to a hiring manager in a company you want to work for; use a personal, conversational voice.
- Include top-level highlights of your job experience, education, skills, accomplishments, target industry, and career direction.
- Use keywords from target job descriptions.

Experience

- Start with the material from your résumé.
- Make sure the basic details of your employment (years, job titles, company names) match your résumé.
- Expand beyond those basics as appropriate, including linking to photos and videos of work-related accomplishments.

Recommendations

- Ask for recommendations from people you know on LinkedIn.
- As your network expands you'll have more people to ask.
- A great way to get recommendations is to give them to the people in your network.

Skills

- List your top skills and areas of expertise.
- As you expand your network, endorse the skills of people you know.
- Many users will endorse your skills in return.

Education

- Make sure your educational listing is complete.
- Include relevant military or company training and independent coursework.
- Verify that it matches the information on your conventional résumé.

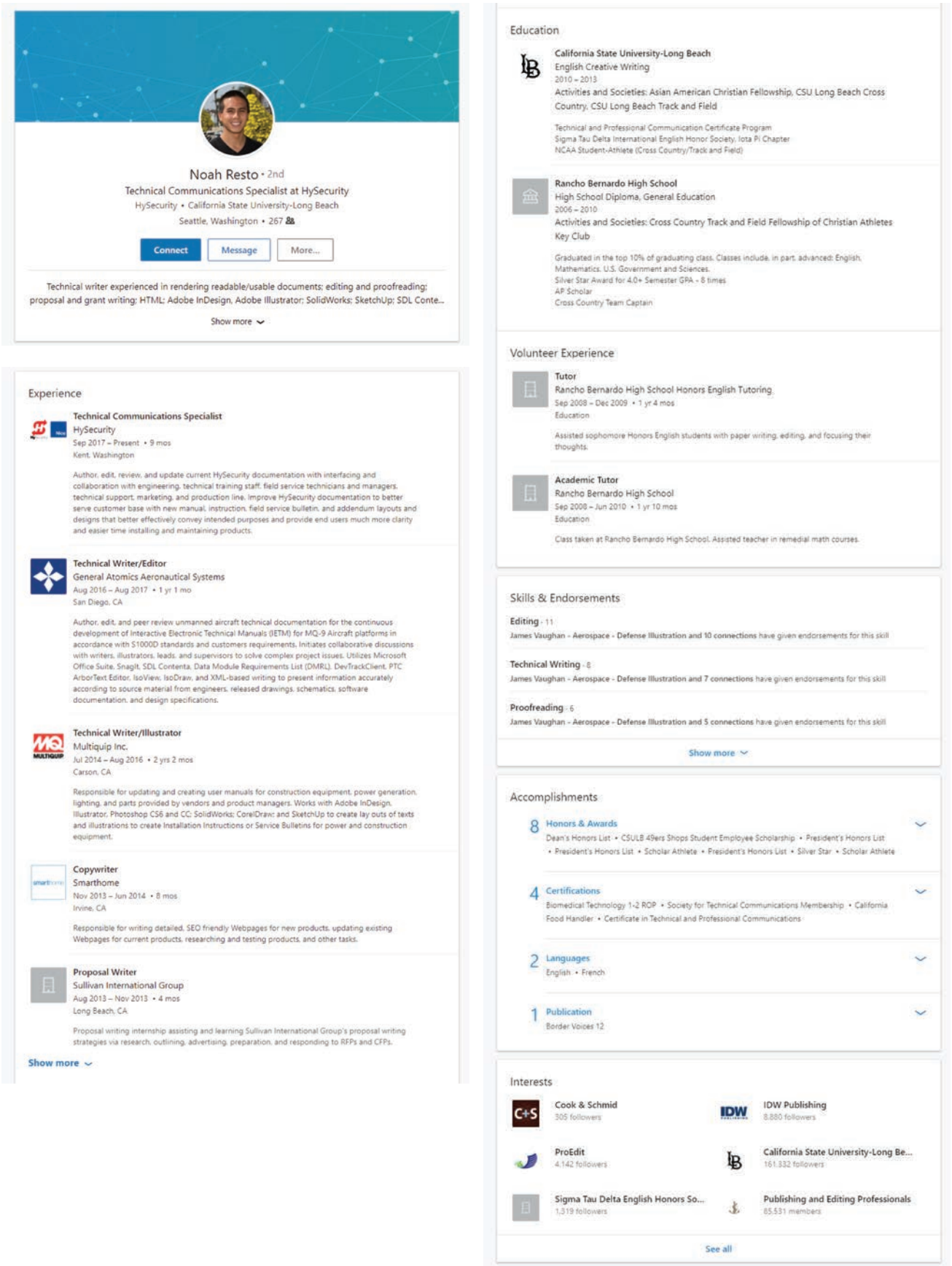
Accomplishments

- Explore all the categories available to find opportunities to highlight academic successes, leadership qualities, creative thinking, industry certifications, and so on.
- Note that you need to manually add these categories to your profile.
- If you don't have extensive work history, use this section to feature academic projects and awards.

Volunteering

- Add volunteer work you've done, particularly activities that developed professional skills such as project management or team leadership.

Figure 18.7 Quick Tips for a Compelling LinkedIn Profile
Follow these tips to get started on building or expanding your LinkedIn profile.



Courtesy of LinkedIn

Figure 18.8 Effective LinkedIn Profile
Noah Resto effectively communicates his capabilities and professional personality through his LinkedIn profile.

COMMUNICATION CHALLENGES AT Burning Glass

You work as a recruiter in the human resources department at Burning Glass's Boston headquarters, where part of your responsibility involves using the applicant tracking system to identify promising job candidates. Solve these challenges by using what you've learned about presenting oneself effectively on a résumé.

INDIVIDUAL CHALLENGE: One of today's tasks is selecting candidates to be interviewed for a management trainee position. This position involves significant interaction with other departments, so communication skills are vital. The applicant tracking system has turned up two candidates with almost identical qualifications. You have time to interview only one of them, however. Based on the way the two candidates described their education, which one would you invite in for an interview—and why?

1. **Morehouse College, Atlanta, GA, 2014–2018.** Received BA degree with a major in Business Administration and a minor in Finance. Graduated with a 3.65 grade point average. Played varsity football and basketball. Worked 15 hours per week in the library. Coordinated the local student chapter of the American Management Association. Member of Alpha Phi Alpha social fraternity.
2. I attended Wayne State University in Detroit, Michigan, for two years and then transferred to the University of Michigan at Ann Arbor, where I completed my studies. My major was economics, but I also took many business management courses, including employee motivation, small-business administration, history of business start-ups, and organizational behavior. I selected courses based on the professors' reputation for excellence, and I received mostly As and Bs. Unlike many other college students, I viewed the acquisition of knowledge—rather than career preparation—as my primary goal. I believe I have received a well-rounded education that has prepared me to approach management situations as problem-solving exercises.

TEAM CHALLENGE: To find candidates for an accounting associate position (a job typically filled by college graduates rather than more experienced professionals), you searched the applicant tracking system and found the following rather unconventional résumé. With one or two other students, decide whether you should (1) invite this candidate for an interview, (2) reject the application without further analysis, (3) review the candidate's web-based e-portfolio and then make a decision about inviting him in for an interview, or (4) compare the candidate's qualifications relative to those of other applicants and invite him in for an interview only if you cannot find several qualified applicants. Explain your choice.

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Career Objective: To build a successful career in business management

Summary of Qualifications: As a student at the University of Oklahoma, Stillwater, completed a wide variety of assignments that demonstrate skills related to business and management. For example:

Planning skills: As president of the university's foreign affairs forum, organized six lectures and workshops featuring 36 speakers from 16 foreign countries within a nine-month period. Identified and recruited the speakers, handled their travel arrangements, and scheduled the facilities.

Communication skills: Wrote more than 25 essays and term papers on various academic topics, including at least 10 dealing with business and finance. As a senior, wrote a 20-page analysis of financial trends in the petroleum industry, interviewing five high-ranking executives in accounting and finance positions at ConocoPhillips's refinery in Ponca City, Oklahoma, and company headquarters in Houston, Texas.

Business and computer skills: Competent in all areas of Microsoft Office, including Excel spreadsheets and Access databases. Assisted with accounting activities in parents' small business. Have taken courses in accounting, financial planning, database design, web design, and computer networking.

For more information, including employment history, please access my e-portfolio at **http://dariusjaidee.com**.

Key Terms

applicant tracking systems (ATS) Computer systems that capture and store incoming résumés and help recruiters find good prospects for current openings

chronological résumé The most common résumé format; it emphasizes work experience, with past jobs shown in reverse chronological order

combination résumé Format that includes the best features of the chronological and functional approaches

functional résumé Format that emphasizes your skills and capabilities while identifying employers and academic experience in subordinate sections; many recruiters view this format with suspicion

networking The process of making connections with mutually beneficial business contacts

Summary of Learning Objectives

1 List eight key steps to finding the ideal opportunity in today's job market. The eight steps discussed in this chapter are (1) writing the story of you, which involves describing where you have been in your career so far and where you would like to go in the future; (2) learning to think like an employer so you can present yourself as a quality hire; (3) researching industries and companies of interest to identify promising opportunities and to learn the language of hiring managers; (4) translating your general potential into a specific solution for each employer so that you look like a good fit for each opening; (5) taking the initiative to approach interesting companies even if they haven't yet posted any job openings; (6) building your network so you and your connections can help each other in the job-search process; (7) seeking career counseling if appropriate; and (8) avoiding the easily avoidable mistakes that can ruin your chances of getting a job.

2 Explain the process of planning your résumé, including how to choose the best résumé organization. Planning a résumé starts with recognizing what it is: a persuasive message designed to get you job interviews. Gathering the necessary information involves learning about target industries, professions, companies, and specific positions as well as gathering information about yourself. Choosing the best résumé organization depends on your background and your goals. A chronological résumé helps employers easily locate necessary information, highlights your professional growth and career progress, and emphasizes continuity and stability. If you can use the chronological format, you should because it is the approach employers tend to prefer. A functional résumé helps employers easily see what you can do for them, allows you to emphasize earlier job experience, and lets you downplay any lengthy periods of unemployment or a lack of career progress. This last reason, however, makes many employers suspicious of functional résumés. The combination approach uses the best features of the other two and is often the best choice for recent graduates.

3 Describe the tasks involved in writing your résumé, and list the sections to consider including in your résumé. Adapting to the audience is crucial because readers are looking to see how well you understand their businesses and can present a solution to their talent needs. The major sections to consider including in your résumé are (1) your name and contact information; (2) an introductory statement, which can be a career objective, a qualifications summary, or a career summary; (3) your education; (4) your work experience; and (5) activities and achievements that are professionally relevant. Most résumés for U.S. employers do not need to include any personal data.

4 Characterize the completing step for résumés, including the five most common formats in which you can produce a résumé. Quality is paramount with résumés, so the tasks of revising and proofing are particularly important. The five common résumé formats are traditional printed résumé, plain-text file, Microsoft Word file, PDF, and online résumé (which might be called a personal webpage, an e-portfolio, or a social media résumé).

5 Identify nine tips for creating a successful LinkedIn profile. (1) Add a photo that says "professional" without being overly formal. (2) Write a headline that expresses who you are or aspire to be as a professional. (3) Write a summary that captures where you are and where you are going. (4) Fill out the experience section using the material from your conventional résumé. (5) Ask for recommendations from people you know on LinkedIn; add to your recommendations as you expand your network. (6) Under Featured Skills, list your top skills and areas of expertise. (7) Make sure your educational listing is complete and matches the information on your conventional résumé. (8) List highlight academic achievements, special projects, publications, professional certifications, important coursework, honors, and patents under Accomplishments. (9) Add volunteer activities and charitable organizations that you support.

Test Your Knowledge

To review chapter content related to each question, refer to the indicated Learning Objective.

18-1. What does *quality of hire* mean? [LO-1]
18-2. Why is it important to have an organized approach to finding a new job? [LO-1]
18-3. Why is it important to contribute to any networks you belong to in addition to looking for assistance for your own career? [LO-1]
18-4. What is the purpose of a résumé? [LO-2]
18-5. Why are some employers suspicious of the functional résumé? [LO-2]
18-6. What are keywords? [LO-3]
18-7. Should you include personal data on a résumé? Explain your answer. [LO-3]
18-8. What is a plain-text résumé? [LO-4]
18-9. What should you write in the Headline field of your LinkedIn profile? [LO-5]
18-10. If you don't have extensive professional experience yet, how can you use the Accomplishments section of your LinkedIn profile to convey your skills? [LO-5]

Apply Your Knowledge

To review chapter content related to each question, refer to the indicated Learning Objective.

18-11. How can you "think like an employer" if you have no professional business experience? [LO-1]
18-12. If you were a team leader at a summer camp for children with special needs, should you include this information in your employment history if you are applying for work that is unrelated? Explain your answer. [LO-3]
18-13. Can you use a qualifications summary if you don't yet have extensive professional experience in your desired career? Why or why not? [LO-3]

18-14. Some people don't have a clear career path when they enter the job market. If you're in this situation, how would your uncertainty affect the way your write your résumé? [LO-3]

18-15. Should you bother creating a LinkedIn profile if you have no work experience? Why or why not? [LO-5]

Practice Your Skills

Message for Analysis

18-16. Writing a Résumé [LO-3] Read the following résumé information and then (1) analyze the strengths or weaknesses of the information and (2) revise the résumé so that it follows the guidelines presented in this chapter.

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smanchester@rcnmail.com

PERSONAL: Single, excellent health, 5'7", 136 lbs.; hobbies include cooking, dancing, and reading.

JOB OBJECTIVE: To obtain a responsible position in marketing or sales with a good company.

EDUCATION: BA degree in biology, University of Louisiana, 1998. Graduated with a 3.0 average. Member of the varsity cheerleading squad. President of Panhellenic League. Homecoming queen.

WORK EXPERIENCE

Fisher Scientific Instruments, 2018 to now, field sales representative. Responsible for calling on customers and explaining the features of Fisher's line of laboratory instruments. Also responsible for writing sales letters, attending trade shows, and preparing weekly sales reports.

Fisher Scientific Instruments, 2014–2017, customer service representative. Was responsible for handling incoming phone calls from customers who had questions about delivery, quality, or operation of Fisher's line of laboratory instruments. Also handled miscellaneous correspondence with customers.

Medical Electronics, Inc., 2011–2014, administrative assistant to the vice president of marketing. In addition to handling typical secretarial chores for the vice president of marketing, I was in charge of compiling the monthly sales reports, using figures provided by members of the field sales force. I also was given responsibility for doing various market research activities.

New Orleans Convention and Visitors Bureau, 2008–2011, summers, tour guide. During the summers of my college years, I led tours of New Orleans for tourists visiting the city. My duties included greeting conventioneers and their spouses at hotels, explaining the history and features of the city during an all-day sightseeing tour, and answering questions about New Orleans and its attractions. During my fourth summer with the bureau, I was asked to help train the new tour guides. I prepared a handbook that provided interesting facts about the various tourist attractions, as well as answers to the most commonly asked tourist questions. The Bureau was so impressed with the handbook they had it printed up so that it could be given as a gift to visitors.

University of Louisiana, 2008–2011, part-time clerk in admissions office. While I was a student in college, I worked 15 hours a week in the admissions office. My duties included filing, processing applications, and handling correspondence with high school students and administrators.

Exercises

Each activity is labeled according to the primary skill or skills you will need to use. To review relevant chapter content, refer to the indicated Learning Objective. In some instances, supporting information will be found in another chapter, as indicated.

18-17. Career Management: Researching Career Opportunities [LO-1] Based on the preferences you identified in the self-assessment in the Prologue (see page xxxv) and the academic, professional, and personal qualities you have to offer, perform an online search for a career opportunity that matches your interests and qualifications (starting with any of the websites listed in Table 18.2). Draft a one-page report indicating how the career you select and the job openings you find match your strengths and preferences.

18-18. Message Strategies: Planning a Résumé [LO-2] Identify a position in an interesting career field that you could potentially be qualified for upon graduation. Using at least three different sources, including the description in an online job posting, create a list of 10 keywords that should be included in a résumé customized for this position.

18-19. Message Strategies: Writing a Résumé; Collaboration: Team Projects [LO-3], Chapter 2 Working with another student, change the following statements to make them more effective for a résumé by using action verbs and concrete keywords.

a. Have some experience with database design.
b. Assigned to a project to analyze the cost accounting methods for a large manufacturer.
c. I was part of a team that developed a new inventory control system.
d. Am responsible for preparing the quarterly department budget.
e. Was a manager of a department with seven employees working for me.
f. Was responsible for developing a spreadsheet to analyze monthly sales by department.
g. Put in place a new program for ordering supplies.

18-20. Message Strategies: Writing a Résumé [LO-3] Using your team's answers to Exercise 18-19, make the statements stronger by quantifying them (make up any numbers you need).

18-21. Message Strategies: Writing a Résumé; Communication Ethics: Resolving Ethical Dilemmas [LO-3], Chapter 1 Assume that you achieved all the tasks shown in Exercise 18-19 not as an individual employee but as part of a work team. In your résumé, must you mention other team members? Explain your answer.

18-22. Message Strategies: Completing a Résumé; Media Strategies: Video [LO-4] Imagine you are applying for work in a field that involves speaking in front of an audience, such as sales, consulting, management, or training. Using material you created for any of the exercises or cases in Chapter 17, record a two- to three-minute video demonstration of your speaking and presentation skills. Record yourself speaking to an audience if one can be arranged.

18-23. Message Strategies: Social Media [LO-5] Search LinkedIn for three people in a profession that you might like to pursue and compare how they use the system's features to present themselves. Which person used LinkedIn most effectively? How can you apply what he or she has done to your own profile?

Expand Your Skills

Critique the Professionals

Locate an example of a résumé (a sample or an actual résumé). Analyze it following the guidelines presented in this chapter. Using whatever medium your instructor requests, write a brief analysis (no more than one page) of the résumé's strengths and weaknesses, citing specific elements from the résumé and support from the chapter. If you are analyzing a real résumé, do not include any personally identifiable data, such as the person's name, email address, or phone number, in your report.

Sharpen Your Career Skills Online

Find a website, video, article, podcast, or presentation that offers advice on creating effective online résumés. Write a brief email message to your instructor or a post for your class blog describing the item that you found and summarizing the career skills information you learned from it.

Build Your Career

A key part of your employment communication package is a list of people who will agree to serve as references. As this chapter explains, there are three types of references to think about: professional references (people who are willing to vouch for your qualifications), personal references (people who are willing to vouch for your character), and LinkedIn recommendations (people who are willing to recommended you on LinkedIn).

In the weeks ahead, start thinking about the people who might serve as positive references for you. Allow plenty of time to contact everyone, and always ask before using anyone as a personal or professional reference. Not only is this good manners (not everyone is willing or able to serve as a reference), but it can help you avoid the embarrassing scenario of giving employers the name of someone who winds up speaking negatively about you.

Cases

For all cases, feel free to use your creativity to make up any details you need to craft effective messages.

CAREER SKILLS/EMAIL SKILLS

18-24. Career Planning: Researching Career Opportunities [LO-1] Knowing the jargon and "hot-button" issues in a profession or industry can give you a big advantage when it comes to writing your résumé and participating in job interviews. You can fine-tune your résumé for both human readers and applicant tracking systems, sound more confident and informed in interviews, and present yourself as a professional with an inquiring mind.

Your task: Imagine a specific job category in one of the following companies: Adobe, Edward Jones, General Motors, Hilton, Kaiser Permanente, Nordstrom, or Salesforce. This doesn't have to be a current job opening but a position you know exists or is likely to exist in your chosen company.

Explore the company's website and other online sources to find the following: (1) a brief description of what this job entails with enough detail so that you could describe it to a fellow student; (2) some of the terminology used in the profession or industry, both formal terms that might serve as keywords on your résumé and informal terms and phrases that insiders are likely to use in publications and conversations; (3) an ongoing online conversation among people in this profession, such as a LinkedIn Group, a popular industry or professional blog that seems to get quite a few comments, or an industry or professional publication that attracts a lot of comments; and (4) at least one significant issue that will affect people in this profession or companies in this industry over the next few years. For example, if your chosen profession involves accounting in a publicly traded corporation, potential changes in financial reporting standards would be a significant issue. Similarly, for a company in the consumer electronics industry, the recycling and disposal of *e-waste* is an issue. Write a brief email message

summarizing your findings and explaining how you could use this information on your résumé and during job interviews.

CAREER SKILLS/EMAIL SKILLS

18-25. Career Management: Researching Career Opportunities [LO-1] Perhaps you won't be able to land your ultimate dream job right out of college, but that doesn't mean you shouldn't start planning right now to make that dream come true.

Your task: Find a job opening that sounds perfect for you, even if you're not yet qualified for it. It might even be something that would take 10 or 20 years to reach. Don't settle for something that's not quite right—find a job that is so "you" and so exciting that you would jump out of bed every morning, eager to go to work. Start with the job description you found online and then supplement it with additional research so that you get a good picture of what this job and career path are all about. Compile a list of all the qualifications you would need to have a reasonable chance of landing such a job. Now compare this list with your current résumé. Write a brief email message to your instructor that identifies all the areas in which you would need to improve your skills, work experience, education, and other qualifications to land your dream job.

CAREER SKILLS/TEAM SKILLS

18-26. Planning a Résumé [LO-2] If you haven't begun your professional career yet or are pursuing a career change, the employment history section on your résumé can sometimes be a challenge to write. A brainstorming session with your classmates could help.

Your task: In a team assigned by your instructor, help each other evaluate your employment histories and figure out the best way to present your work backgrounds on a résumé. First, each member of the team should compile his or her work history, including freelance projects and volunteer work if relevant, and share this information with the team. After allowing some time for everyone to review each other's information, meet as a team (in person if you can or online otherwise). Discuss each person's history, pointing out strong spots and weak spots, and then brainstorm the best way to present each person's employment history.
Note: If you would rather not share aspects of your employment history with your teammates, substitute a similar experience of the same duration.

CAREER SKILLS/TEAM SKILLS

18-27. Message Strategies: Writing a Résumé [LO-3] The introductory statement of a résumé requires some careful thought, in deciding both which of the three types of introductory statement (see page 531) to use and what information to include in it. Getting another person's perspective on this communication challenge can be helpful. In this activity, in fact, someone else is going to write your introductory statement for you, and you will return the favor.

Your task: Pair off with a classmate. Provide each other with the basic facts about your qualifications, work history, education, and career objectives. Then meet in person or online for an informal interview in which you ask each other questions to flesh out the information you have on each other. Assume that each of you has chosen to use a qualifications summary for your résumé. Now write each other's qualifications summary and then trade them for review. As you read what your partner wrote about you, ask yourself whether it feels true to what you believe about yourself and your career aspirations. Do you think it introduces you effectively to potential employers? What about it might you change?

CAREER SKILLS/PRESENTATION SKILLS/PORTFOLIO BUILDER

18-28. Message Strategies: Completing a Résumé [LO-4] Creating presentations and other multimedia supplements can be a great way to expand on the brief overview that a résumé provides.

Your task: Starting with any version of a résumé you've created for yourself, create a presentation that expands on your résumé information to give potential employers a more complete picture of what you can contribute. Include samples of your work, testimonials from current or past employers and colleagues, videos of speeches you've made, and anything else that tells the story of the professional "you." If you have a specific job or type of job in mind, focus your presentation on that. Otherwise, present a more general picture that shows why you would be a great employee for any company to consider.

CAREER SKILLS/VIDEO SKILLS

18-29. Message Strategies: Completing a Résumé [LO-4] **In the right circumstances, brief videos can be an effective complement to a traditional job-search communication package.**

Your task: Find a job opening that interests you (something you are at least partially qualified for at this stage of your career) and produce a brief (30 to 60 seconds) video profile of yourself, highlighting the skills mentioned in the job description. For tips on producing effective video, visit **www.indie-film-making.com**.

CAREER SKILLS/SOCIAL NETWORKING SKILLS

18-30. Message Strategies: Building a LinkedIn Profile [LO-5] Your LinkedIn summary is a great opportunity to present a clear picture of who you are and what you can bring to a job.

Your task: Draft a summary for your LinkedIn profile, making sure to stay within the system's current length limits for this field. Review the advice in this chapter and search online for "writing a LinkedIn summary" if you need more tips.

Five-Minute Guide to Planning Your Résumé

Your résumé is one of the most important documents you will ever write, so before you start, take five minutes to review these important tips.

00:01

Choose the best format for your situation

1. Chronological
   - Emphasizes your work history, with past jobs listed in reverse chronological order.
   - This is the format most employers prefer.
   - Use this format if you can, but if you have limited work experience or large gaps in your work history, consider the combination formation instead.
2. Functional
   - Showcases skill areas without requiring readers to dig through work history.
   - However, many employers are wary of it because it can obscure an uneven work history.
3. Combination
   - Combines the best of the other two while overcoming the weakness of the functional format.
   - Probably the best choice for new graduates and early-career professionals.

00:02

Address any areas of concern

1. If you have issues in your personal or professional history that might be a concern for employers, assess them objectively.
2. Remember that you don't need to address every issue in your résumé; some matters are better to address in your cover letter or during an interview.

00:03

Choose the best type of introductory statement

1. Career objective
   - This is the traditional choice but used less these days.
   - Potential weakness is that it tends to be about the employee's needs, not how the employee can meet the employer's needs.
   - Consider it if you don't have much experience and no dominant theme to convey in a qualifications summary.
   - If you use it, word it in a way that relates your aspirations to employer needs.
2. Qualifications summary
   - Offers a brief view of your key qualifications, letting a reader know within a few seconds what you can deliver.
   - Consider using it if you have one or more important qualifications or a dominant professional "theme" but don't yet have a long career history.
3. Career summary
   - Offers a brief recap of your career with the goal of presenting increasing levels of responsibility and performance.
   - Particularly good for people who have demonstrated the ability to take on increasing levels of responsibility in their chosen field and who want to continue in that field.

00:04

Choose a design strategy

1. Don't choose any format or design just because it is trendy or unusual; choose it because it meets a specific communication need that is relevant to your job search.
2. Remember that many résumés get fed into applicant tracking systems, and the simpler the design, the fewer problems these systems will have analyzing your information.
3. A straightforward design that is easy to read is always better than an eye-catching design that is difficult to read.

00:05

Produce it in multiple formats as needed

1. Even if some employers don't request it, a conventional résumé helps you organize and summarize your key message points.
2. Plain-text and PDF versions are easy to create from your conventional résumé.
3. Your LinkedIn profile is the most beneficial type of online résumé to create.

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19 Applying and Interviewing for Employment

LEARNING OBJECTIVES

After studying this chapter, you will be able to

1. Explain the purposes of application letters, and describe how to apply the AIDA organizational approach to them.
2. Describe the typical sequence of job interviews, the major types of interviews and interview questions, and the attributes employers look for during an interview.
3. List six tasks you need to complete to prepare for a successful job interview.
4. Explain how to succeed in all three stages of an interview.
5. Identify the most common employment messages that follow an interview, and explain when you would use each one.



Willy Sanjuan/Invision/AP Images

Patreon's Erica Joy Baker is a leading voice for change in how high-tech companies hire and manage employees.

COMMUNICATION CLOSE-UP AT Patreon

www.patreon.com

When companies prepare to hire employees, it makes sense for them to establish criteria for the skills, experience, education, and other attributes that candidates should possess. Together, all these criteria create a sort of "template" that hiring managers can use to evaluate applicants, which helps ensure that all candidates get measured against the same criteria.

While this sounds sensible in theory, it is often flawed in practice, with negative consequences for companies and aspiring employees alike. Hiring templates have three potential problems. First, they can be unrealistic, with companies setting standards that few candidates can meet—and that are sometimes far in excess of what positions really require. This became a common complaint with the advent of applicant tracking systems, which filter out anyone who doesn't meet whatever criteria are programmed into the system. Companies sometimes say they can't find anybody to fill openings, but qualified applicants are standing right outside the gates, so to speak, waving their arms and saying, "We're here, but your systems won't let us in."

A second and more difficult problem to solve with hiring templates is that they are both explicit and implicit. The *explicit* parts of the template are all the written criteria in the job description and in any tests or assignments that candidates are asked to complete. The *implicit* parts are the qualitative, "gut feel" decisions, sometimes unspoken, that recruiters and interviewers make about candidates. While these criteria don't show up in job descriptions, they can be even more difficult for candidates to get past. For example, interviewers frequently try to assess whether a candidate is "one of us," somebody who can fit into the organization's work culture. This practice can be a good thing, but it can be problematic if that culture is toxic or exclusionary.

The first two problems can contribute to a third problem, which is the tendency for companies to recruit more of the same—people from the same universities, with the same degrees, from the same companies, in the same social networks, and so on. For example, Silicon Valley's most prominent companies have tended to select graduates from a small handful of universities—and not surprisingly, it's often the same schools that their founders and leaders graduated from.

When companies succumb to these hiring practices, they can end up with monocultures in which most of the workforce looks alike, talks alike, and acts alike. People who don't fit the template

often don't make it through the hiring process, and those who do can feel like outsiders even when they do make it inside. In Silicon Valley, that sometimes means young white and Asian males from elite universities on the inside, and everybody else on the outside. The industry has made headlines in recent years with reports of gender bias, pay disparity, and sexual harassment.

When companies take a different strategy, the results can expose the flaws in the conventional approach. For example, when firms use *blind auditions* or *blind assessments* to screen applicants, in which candidates' qualifications are assessed anonymously, more women and graduates of community colleges get past the initial screening stage than they do in traditional interviewing processes. (The Intelligent Communication Technology box on page 564 has more on this topic.) Open-source software projects, in which anyone can contribute sections of program code, subject to approval of a governing body, provide more evidence of exclusionary bias. When the gender of contributors is known to the gatekeepers, women's contributions are accepted less often than men's contributions are. However, if the process is anonymized so gatekeepers don't know contributors' gender, the situation is reversed.

A growing chorus is calling for hiring and workplace reform, and one of the voices leading this discussion is Erica Joy Baker. From being the only black woman among hundreds of students in her first computer science course to a decade of working her way up the technical ranks at Google, she knows firsthand the challenges faced by people who don't fit the prevailing template. She started out questioning whether she belonged in computer science at all during her first year in college, but she is now a senior engineering manager at the crowdfunding company Patreon.

Baker uses her leadership influence within her own company to create positive change, and she has established a broad reach across the tech industry. She speaks and writes regularly on the topic and is one of the founding members of Project Include (**projectinclude.org**). This nonprofit organization works to help tech companies build comprehensive hiring practices and equitable management systems that embrace and support the entire spectrum of available talent.

If you don't fit the stereotypical template in your chosen profession, take heart. Smart companies are beginning to realize that talent comes in a lot of different packages and travels a lot of different paths. For example, Google has expanded the number of colleges where it recruits, more companies are using blind auditions, and some companies now peg executive compensation to how well leaders avoid monocultural hiring practices. Organizations such as Project Include and Code 2040 (**www.code2040.org**) are educating investors and executives on the moral imperatives and financial benefits of inclusive hiring.

Baker is often lauded for her tenacity and resilience at forging a path through the tech industry, but she and many others would like to see a business world where you don't need superhero grit to overcome odds because the odds aren't stacked against anyone in the first place.[1]

Submitting Your Résumé

1 LEARNING OBJECTIVE
Explain the purposes of application letters, and describe how to apply the AIDA organizational approach to them.

Your résumé is usually the centerpiece of your job-search package, but it needs support from several other employment messages, including application letters, job-inquiry letters, application forms, and follow-up notes.

WRITING APPLICATION LETTERS

Always accompany your résumé with a printed or email *application letter*, also known as a cover letter, that motivates the recipient to read the résumé.

Whenever you email a résumé to a recruiter or other contact in a company, use the body of your email message as an **application letter**, also known as a *cover letter*. (Even though this message is often not a printed letter anymore, many professionals still refer to it as a letter.) Note that not all recruiters take the time to read application letters, particularly at companies that receive a high volume of applications.[2] However, if you are emailing someone directly, it's good practice to include one anyway. It might catch the recruiter's eye, and the hiring manager who eventually gets your résumé may be interested in reading it.[3] (Some online application systems allow you to upload an application message, but many don't, so when you apply online, you might not have the opportunity to include an application letter.)

An application letter has three goals: to introduce your résumé, persuade an employer to read it, and request an interview. Recognize that this message is a great opportunity, too: You can communicate in a more personal and conversational way than you can with your résumé, you can show that you understand what an employer is looking for, and you can demonstrate your writing skills. Another key opportunity here involves soft skills, such as interpersonal communication, which are difficult to quantify in a meaningful way on your résumé. In the letter, you can briefly describe a situation in which you used these skills to reach a measurable business result, for example, which is more compelling than simply listing skills.[4]

The best approach for an application letter depends on whether you are applying for an identified job opening or are *prospecting*—taking the initiative to write to companies even though they haven't announced a job opening that is right for you.[5] In many ways, the difference between the two is like the difference between solicited and unsolicited proposals (see page 409).

Figure 19.1 shows an application message written in response to a posted job opening. The writer knows exactly what qualifications the organization is seeking and can "echo" those attributes back in his letter.

The best approach for an application letter depends on whether you are responding to an advertised job opening or *prospecting*—writing to companies to express interest even though they haven't posted an opening.

Position			Supply Chain Pricing Analyst	Apply	
Position code	T23-6678	Location	Tacoma, WA	Status	Full-time

Sea-Air Global Transport has an immediate opening for a supply chain pricing analyst in our Tacoma, WA, headquarters. This challenging position requires excellent communication skills in a variety of media, a polished customer service presence both in person and over the phone, and proven aptitude in statistical analysis and business mathematics.

The minimum educational requirement for this position is a bachelor's degree or equivalent, preferably in business, statistical methods, or applied mathematics. Experience in customer service is highly desirable, and experience in transportation or logistics is a major plus.

Click here to learn more about Sea-Air or click here to explore the attractive compensation and benefits packages we offer all employees.

← Smith's application letter echoes the language of the job posting.

27225 Eucalyptus Avenue
Long Beach, CA 90806
March 12, 2021

Hiring Manager
Sea-Air Global Transport
5467 Port of Tacoma Rd., Suite 230
Tacoma, WA 98421

Dear Hiring Manager:

The first sentence grabs attention by indicating knowledge of the company and its industry. →

Sea-Air Global Transport consistently appeared as a top transportation firm in the research I did for my senior project in global supply chain management, so imagine my delight when I discovered the opening for an export pricing analyst in your Tacoma headquarters (Position Code: T23-6678). With a major in business and a minor in statistical methods, my education has been ideal preparation for the challenges of this position.

← The opening paragraph identifies the specific job for which he is applying.

In fact, my senior project demonstrates most of the skills listed in your job description, including written communication skills, analytical abilities, and math aptitude. I enjoyed the opportunity to put my math skills to the test as part of the statistical comparison of various freight modes.

← In this discussion of his skills, he echoes the qualifications stated in the job posting.

The reference to his résumé emphasizes his customer service orientation and also shows he has done his homework by researching the company. →

As you can see from my résumé, I also have more than three years of part-time experience working with customers in both retail and commercial settings. This experience taught me the importance of customer service, and I want to start my professional career with a company that truly values the customer. In reviewing your website and reading several articles on Lloyd's List and other trade websites, I am impressed by Sea-Air's constant attention to customer service in this highly competitive industry.

My verbal communication skills would be best demonstrated in an interview, of course. I would be happy to meet with a representative of your company at their earliest convenience. I can be reached at dalton.k.smith@gmail.com or by phone at (562) 555-3737.

← In the close, he politely asks for an interview in a way that emphasizes yet another job-related skill.

Sincerely,

Dalton Smith

Dalton Smith

Figure 19.1 Solicited Application Message
In this response to an online job posting, Dalton Smith highlights his qualifications while mirroring the requirements specified in the posting. Following the AIDA model (see page 348), he grabs attention immediately by letting the reader know he is familiar with the company and the global transportation business.

Writing a prospecting letter is more challenging because you don't have the clear target you have with a solicited letter and the message is unexpected. You will need to do more research to identify the qualities that a company would probably seek for the position you hope to occupy (see Figure 19.2). Also, search for news items that involve the company, its customers, the profession, or the individual manager to whom you are writing. Using this information in your application letter helps you establish common ground with your reader—and it shows that you are tuned in to what is going on in the industry.

For either type of letter, follow these tips to be more effective:[6]

- Resist the temptation to stand out with gimmicky application letters; impress with knowledge and professionalism instead.
- If the name of the hiring manager is findable, address your letter to that person. (And if it is findable, make sure you find it because other applicants will.) Search LinkedIn, the company's website, industry directories, Twitter, and anything else you can think of to locate an appropriate name. Ask the people in your network if they know a name, or call the company and ask. If you're sure a name can't be found, address your letter to "Dear Hiring Manager."
- Clearly identify the opportunity you are applying for or expressing interest in.
- Show that you understand the company and its business challenges. Incorporate relevant keywords from your research.
- If applicable, explain employment gaps or other potential negatives from your résumé. This explanation can be as simple as "After serving as a product manager at Microsoft, I took two years off for family reasons."
- Keep it short—no more than three or four brief paragraphs. Remember that all you are trying to do at this point is move the conversation forward one step.
- Show some personality while maintaining a business-appropriate tone. The letter gives you the opportunity to balance the facts-only tone of your résumé. Project confidence without being arrogant.
- Don't just repeat information from your résumé; use the conversational tone of the letter to convey additional professional and personal qualities and your reasons for wanting this particular job.
- Be sure to adapt each letter to a specific job opening (see Figure 19.3 on page 556).

Because application letters are persuasive messages, the AIDA approach you learned in Chapter 12 is ideal, as the following sections explain. Note that this use of the AIDA model employs the direct approach, not the indirect approach used in most other persuasive messages. With an application letter, you need to let the reader know what you seek within the first sentence or two.

Getting Attention

The first paragraph of your application letter needs to clearly convey the reason you're writing and give the recipient a compelling reason to keep reading.

The opening paragraph of your application letter must accomplish two essential tasks: (1) explain why you are writing and (2) give the recipient a reason to keep reading by showing that you have some immediate potential for meeting the company's needs. Consider this opening:

> With the recent slowdown in corporate purchasing, I can certainly appreciate the challenge of new fleet sales in this business environment. With my high energy level and 16 months of new-car sales experience, I believe I can produce the results you listed as vital in the job posting on your website.

This applicant does a smooth job of echoing the company's stated needs while highlighting personal qualifications and an understanding of the market. Notice how enthusiasm and knowledge of the industry balance the writer's relative lack of experience. Table 19.1 on page 556 suggests some other ways you can spark interest and grab attention in your opening paragraph.

Building Interest and Increasing Desire

Use the middle section of your application letter to expand on your opening and present a more complete picture of your strengths.

The middle section of your letter presents your strongest selling points in terms of their potential benefit to the organization, thereby building interest in you and creating a desire to interview you. Be specific and back up your assertions with convincing evidence:

Ineffective

457 Mountain View Rd.
Clear Lake, IA 50428
June 16, 2021

Ms. Patricia Downing, Store Manager
Walmart
840 South Oak
Iowa Falls, IA 50126

Dear Ms. Downing:

Do you have any openings for people who want to move into store management? I am really looking for an opportunity to get a job like yours, even if it takes starting at a low level and working my way up.

Allow me to list some highlights from my enclosed résumé. First, I have a BA degree in retailing, which included such key courses as retailing, marketing, management, and business information systems. Second, I have worked as a clerk and as an assistant manager in a large department store. Third, I have experience in the customer-facing aspect of retailing, as well as operations, marketing, and personnel supervision.

Successful retailing is about more than systems and procedures. It is also about anticipating customer needs, fostering positive relationships with the community, and delivering the type of service that keeps customers coming back. Retailers that fail in any of these areas are doomed to decline in today's hypercompetitive sales environment. I am the sort of forward-thinking, customer-focused leader who can help you avoid this fate.

I will call you next Wednesday at 2:00 to explain why I would make a great addition to your team.

Sincerely,

Glenda Johns

Glenda Johns
Enclosure

(a) The writer commits three major mistakes in the first paragraph: asking a question that she could answer herself by visiting the company's website, failing to demonstrate any knowledge of the company, and making the message all about her.

(b) This paragraph merely repeats information from the enclosed résumé, which wastes the reader's time and wastes the opportunity for the writer to present a more complete picture of herself.

(c) Johns attempts to show that she understands retailing, but this paragraph comes across as an arrogant lecture. The tone is particularly inappropriate, given that she is writing to the store's top manager.

(d) The call to action is overly aggressive, and it presumes that the reader will be available and willing to take a phone call from a complete stranger about a job opening that might not even exist.

Effective

457 Mountain View Rd.
Clear Lake, IA 50428
June 16, 2021

Ms. Patricia Downing, Store Manager
Walmart
840 South Oak
Iowa Falls, IA 50126

Dear Ms. Downing:

Even with its world-class supply chain, admired brand name, and competitive prices, Walmart obviously would not be the success it is without enthusiastic, service-driven associates and managers. If you have or foresee an opening for such a professional, someone eager to learn the Walmart way and eventually move into a management position, please consider me for the opportunity.

As an associate or management trainee, I can bring a passion for retailing and the perspective I've gained through academic preparation and four years of experience. (Please refer to my enclosed résumé for more information.)

Working as a clerk and then as an assistant manager in a large department store taught me how to anticipate customer needs, create effective merchandising, and deliver service that keeps customers coming back. Moreover, my recent BA degree in retailing, which encompassed such courses as retailing concepts, marketing fundamentals, management, and business information systems, prepared me with in-depth awareness of contemporary retailing issues and strategies.

I understand Walmart prefers to promote its managers from within, and I would be pleased to start out with an entry-level position until I gain the necessary experience. Could we have a brief conversation about the possibilities of joining your team? I am available by phone at 641-747-2222 or email at glendajohns@mailnet.com.

Sincerely,

Glenda Johns

Glenda Johns
Enclosure

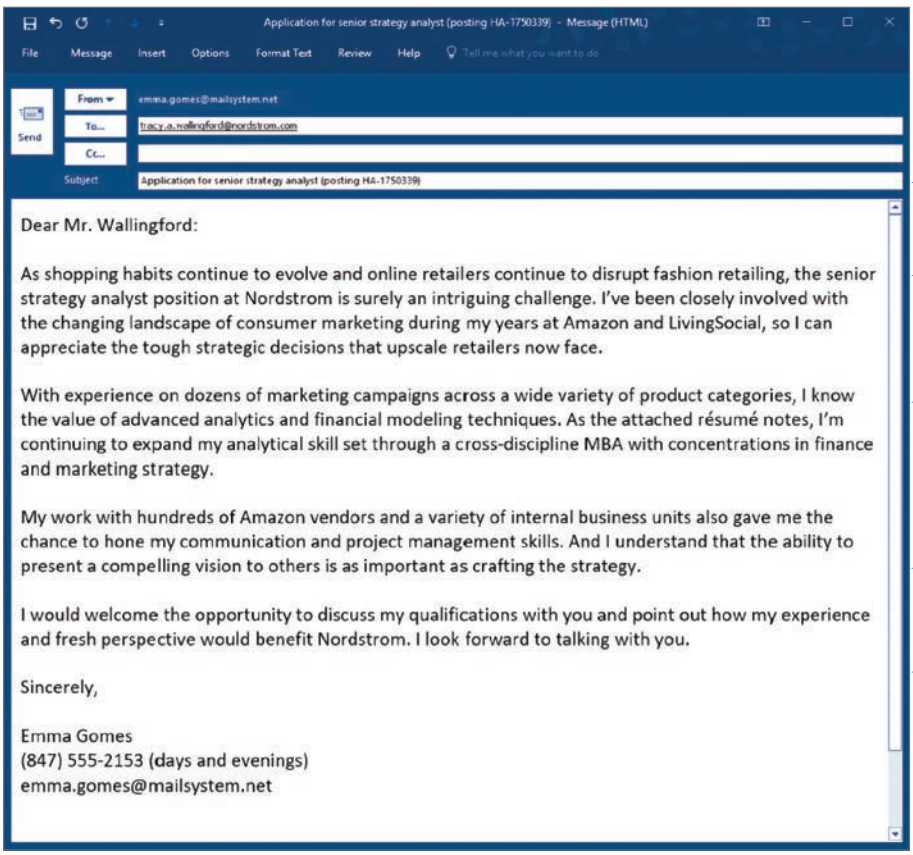
(a) Johns gets the reader's attention by demonstrating good awareness of the company and the type of people it hires, presents herself as just such a professional, and then asks to be considered for any relevant job openings.

(b) Johns uses the body of her letter to expand on the information presented in her résumé rather than simply repeating that information.

(c) The close builds the reader's interest by demonstrating knowledge of the company's policy regarding promotion.

(d) The call to action is respectful, and it makes a response easy for the reader by providing both phone and email contact information.

Figure 19.2 Unsolicited Application Letter
Demonstrating knowledge of the employer's needs and presenting your qualifications accordingly are essential steps in an unsolicited application letter.



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The subject line refers to the job opening using the company's posting number.

The opening paragraph gets the reader's attention by conveying that Gomes understands the challenges the company now faces in a tough retailing environment. She uses the opportunity to mention her work experience, but in a way that relates to the reader's interests.

The first of the two middle paragraphs covers the analytical skills that are required in the position. She refers the reader to her résumé for details and makes a point to highlight the MBA she's working toward—which will fill in some areas missing in her work experience.

This paragraph addresses additional skills mentioned in the job description, particularly interdepartmental communication, project management, and presentations.

The close is confident without being brash, and the email signature provides the necessary contact information.

Figure 19.3 Complementing Your Résumé with an Application Message
When writing a letter or email message to accompany your résumé, use the opportunity to complement the information already contained in your résumé. Highlight how your qualifications match the needs of the position without repeating the information from your résumé. Here is a message that could accompany the résumé in Figure 18.6 on page 536.

TABLE 19.1 Tips for Getting Attention in Application Letters

Tip	Example
Unsolicited Application Letters	
Show how your strongest skills will benefit the organization.	If you need a regional sales specialist who consistently meets sales targets while fostering strong customer relationships, please consider my qualifications.
Describe your understanding of the job's requirements and show how well your qualifications fit them.	Your annual report stated that improving manufacturing efficiency is one of the company's top priorities for next year. Through my postgraduate research in process analysis and consulting work for several companies in the industry, I've developed reliable methods for quickly identifying ways to cut production time while reducing resource use.
Mention the name of a person known to and highly regarded by the reader.	When Janice McHugh of your franchise sales division spoke to our business communication class last week, she said you often need promising new marketing graduates at this time of year.
Refer to publicized company activities, achievements, changes, or new procedures.	Today's issue of the *Detroit News* reports that you may need software engineers with robotics experience when your Lansing tire plant automates this spring.
Use a question to demonstrate your understanding of the organization's needs.	Can your fast-growing market analytics division use a researcher with two years of field survey experience, a B.S. in math, and a strong interest in data mining? If so, please consider me for the position.
Solicited Application Letters	
Identify where you discovered the job opening; describe what you have to offer.	My eight years of experience as a social director in the travel industry have given me all the skills highlighted in the Monster.com listing for the opening in your Caribbean cruise division.

Ineffective: I am trained in business communication and have quite a bit of experience in dealing with customers.

Effective: My business major includes coursework in business communication skills, which helped me gain a promotion to shift supervisor during my summer job at Nordstrom Rack.

In a solicited letter, be sure to discuss each major requirement listed in the job posting. If you are deficient in any of these requirements, stress other solid selling points to help strengthen your overall presentation. Don't restrict your message to just core job duties, either. Highlight personal characteristics that apply to the targeted position, such as your ability to work hard or handle responsibility:

While attending college full-time, I worked part-time during the school year and up to 60 hours a week each summer in order to be totally self-supporting while in college. I can offer your organization the same level of effort and dedication.

Don't bring up salary in your application letter unless the recipient has asked you to include your salary requirements.

Mention your salary requirements only if the organization has asked you to state them. If you don't know the salary that's appropriate for the position and someone with your qualifications, you can find typical salary ranges at the Bureau of Labor Statistics website at **www.bls.gov** and various commercial websites. If you do state a target salary, tie it to the value you can offer:

For the past two years, I have been helping a company similar to yours organize its database marketing efforts. I would therefore like to receive a salary in the same range (the mid-60s) for helping your company set up a more efficient customer database.

Toward the end of the middle section, refer the reader to your résumé by citing a fact or general point covered there:

As you can see in the attached résumé, I've been working part-time with a local publisher since my sophomore year. During that time, I've used client interactions as an opportunity to build strong customer service skills.

Motivating Action

In the final paragraph of your application letter, respectfully ask for specific action and make it easy for the reader to respond.

The final paragraph of your application letter has two important functions: to ask the reader for a specific action (usually an interview) and to facilitate a reply. Include your email address and phone number as well as the best times to reach you:

After you have reviewed my qualifications, could we discuss the possibility of putting my marketing skills to work for your company? I am available at (360) 555-7845 from 2 p.m. to 10 p.m. Monday to Friday or by email at john.wagner462@mailcom.com.

After editing and proofreading your application letter, give it a final quality check by referring to "Checklist: Writing Application Letters." Then send it along with your résumé promptly, especially if you are responding to an advertisement or online job posting.

CHECKLIST ✓ Writing Application Letters

- Take the same care with your application letter that you took with your résumé.
- If you are *prospecting* using an unsolicited message, do deep research to identify the qualities the company likely wants.
- For solicited messages in response to a posted job opening, word your message in a way that echoes the qualifications listed in the posting.
- Open the letter by capturing the reader's attention in a businesslike way.
- Use specific language to clearly state your interests and objectives.
- Build interest and desire in your potential contribution by presenting your key qualifications for the job.
- Link your education, experience, and personal qualities to the job requirements.
- Outline salary requirements only if the organization has requested that you provide them.
- Request an interview at a time and place that is convenient for the reader.
- Make it easy to comply with your request by providing your complete contact information and good times to reach you.
- Adapt your style for cultural variations, if required.

FOLLOWING UP AFTER SUBMITTING A RÉSUMÉ

Deciding if, when, and how to follow up after submitting your résumé and application letter is one of the trickiest parts of a job search. First and foremost, keep in mind that employers continue to evaluate your communication efforts and professionalism during this phase, so don't say or do anything to leave a negative impression.

Second, follow whatever instructions the employer has provided. If a job posting says "no calls," for example, don't call. If the job posting doesn't say this, it's fine to follow up, and most hiring managers view doing so as a sign of initiative. More hiring managers prefer email than phone follow-ups, but you won't be out of line if you try to follow up via phone.[7]

Third, if the job posting lists a *close date*, don't call or write before then because the company is still collecting applications and will not have made a decision about inviting people for interviews. Wait a week or so after the close date. If no close date is given and you have no other information to suggest a time line, you can generally contact the company starting a week or two after submitting your résumé. Some companies offer application status updates on their websites, so be sure to look for that before sending an inquiry or telephoning.[8]

Think creatively about a follow-up message; show that you've continued to add to your skills or that you've learned more about the company or the industry.

When you follow up by email or telephone, you can share an additional piece of information that links your qualifications to the position (keep an eye out for late-breaking news about the company, too) and ask a question about the hiring process as a way to gather some information about your status. Good questions to ask include[9]

- Has a hiring decision been made yet?
- Can you tell me what to expect next in terms of the hiring process?
- What is the company's time frame for filling this position?
- Could I follow up in another week if you haven't had the chance to contact me yet?
- Can I provide any additional information regarding my qualifications for the position?

Whatever the circumstances, a follow-up message can demonstrate that you're sincerely interested in working for the organization, persistent in pursuing your goals, and committed to upgrading your skills.

If you don't land a job at your dream company on the first attempt, don't give up. You can apply again if a new opening appears, or you can send an updated résumé with a new unsolicited application letter that describes how you have gained additional work experience or completed additional coursework. Showing that you are serious about making yourself valuable to a company is a great way to impress hiring managers.

Understanding the Interviewing Process

2 LEARNING OBJECTIVE

Describe the typical sequence of job interviews, the major types of interviews and interview questions, and the attributes employers look for during an interview.

An *employment interview* is a meeting during which you and a potential employer ask questions and exchange information.

An **employment interview** is a meeting during which you and a potential employer ask questions and exchange information. The employer's objective is to find the best talent to fill available job openings, and your objective is to find the right match for your goals and capabilities.

As you get ready to begin interviewing, keep three points in mind:

- The process takes time. Start your preparation and research early; the best job offers usually go to the best-prepared candidates.
- Don't limit your options by looking at only a few companies.
- Interviews are a two-way discovery process—the questions you ask can be as important as the questions companies ask you.

THE TYPICAL SEQUENCE OF INTERVIEWS

The interview process can vary from company to company, but most firms interview candidates in stages as they narrow down the list of possibilities.

The Screening Stage

During the screening stage of interviews, use the limited time available to confirm your fit for the position.

The process usually starts with a *screening* stage designed to filter out applicants who lack the desired qualifications or who might not be willing to accept the salary range or other parameters of the position. This first round of interviews may be conducted by an outside recruiting firm or by staff from the company's human resources (HR) department rather than the manager you would eventually report to. Screening is often done via telephone or an online assessment system.[10] (See "Intelligent Communication Technology: Getting Comfortable with AI-Assisted Recruiting and Interviewing" for more on this approach.) Note that in some cases you may be required to pass an assessment before you are allowed to begin the application process, so be prepared to do some online testing.[11]

During a screening interview, the company wants to know whether you meet the minimum requirements for the job. Study the job description carefully and be ready to respond to questions about the major qualifications of the position, using key points from your résumé. Screening interviews are usually rather brief, and screeners often have many candidates to interview, so keep your answers short and on topic.[12] Bear in mind that you're not going to win the job at this point; your goal is to make it past the filter and on to the next stage.

The Selection Stage

During the selection stage, continue to show how your skills and attributes can help the company.

Candidates who make it past screening are invited to more in-depth interviews that help the company select the person who is most likely to succeed in the position. Feel free to ask the recruiter or your company contact what to expect in the upcoming interviews, including what interviewing formats will be used and which managers are likely to interview you.[14]

Employers take various approaches to the selection stage, but a typical next step is a telephone interview with the hiring manager. The manager will want to dig a little deeper into your qualifications and start to determine your fit with the company's culture. This conversation also gives you the opportunity to see whether you can build rapport with your future boss. During these interviews, show keen interest in the job, relate

INTELLIGENT COMMUNICATION TECHNOLOGY

Getting Comfortable with AI-Assisted Recruiting and Interviewing

Chances are you will interact with some form of artificial intelligence during your job interviews, beginning with your first contact at a company.

To manage the logistics of gathering information and scheduling interviews, many companies now use chatbots to interact with candidates, at least through the initial stages. These chatbots (which can be either standalone apps or integrated into other apps such as Facebook Messenger) typically ask routine screening questions and provide answers you may have about the application process. High-quality systems are designed to transfer the conversation to a human agent if the bot is unable to answer a question. These bots can make the process more efficient for applicants, too, because they tend to be less overloaded and therefore more responsive than the average human recruiter.

AI tools may also be used to evaluate application materials such as writing samples. The Japanese technology conglomerate Softbank, for instance, uses IBM's Watson AI to grade answers to the questions it asks college students who submit applications.

You may encounter AI during video interviews as well. Recall from Chapter 1's Communication Close-Up that companies such as Affectiva use AI to evaluate facial expression and speaking tone, and some systems process speech as well.

The advice for interacting with all these bots might seem a bit counterintuitive, but the best approach is to act naturally and try to forget that you are interacting with pieces of software, not human beings. Communicate as you would with a human recruiter; the bots are designed and trained that way.[13]

WHAT'S YOUR TAKE?

1. Would you resist applying to a company that required you to interact with bots before making connections with a human recruiter? Why or why not?
2. Would you feel comfortable having your written application materials reviewed by an AI system? Why or why not?

Sources: Arya website, accessed 31 May 2019, goarya.com; Karen AI website, accessed 31 May 2019, karen.ai; Cara Heilmann, "Artificial Intelligence and Recruiting: A Candidate's Perspective," *Forbes*, 22 June 2018, www.forbes.com; Shinya Tokushima, "Softbank Uses AI to Assess Students' Job Applications," Asahi Shimbun, 30 May 2017, www.asahi.com; Ben Dickson, "How Artificial Intelligence Optimizes Recruitment," The Next Web, 3 June 2017, thenextweb.com.

your skills and experience to the organization's needs, listen attentively, and ask questions that show you've done your research.

The most promising applicants are usually invited to visit the company for in-person interviews with a variety of staff and managers. For some positions, you might spend most of a day on-site, meeting a variety of managers and professional staff. If you begin to emerge as a favored candidate, the company will start selling you on the advantages of joining the organization. If the interviewers agree that you're the best candidate, you may receive a job offer, either on the spot or within a few days.

COMMON TYPES OF INTERVIEWS AND INTERVIEW QUESTIONS

Be prepared to encounter a variety of interviewing approaches, often within the same interview or set of interviews.

Be prepared to encounter a variety of interviewing approaches, often within the same interview or set of interviews. These approaches can be distinguished by the way they are structured, the number of people involved, and the purpose of the interview.

Structured Versus Unstructured Interviews

A *structured interview* follows a set sequence of questions, allowing the interview team to compare answers from all candidates.

The overall format of an interview is based on whether it is structured or unstructured. In a **structured interview**, the interviewer (or an app or online system) asks a set series of questions in a fixed order. By asking every candidate the same set of questions, the structured format helps ensure fair interviews and makes it easier for an employer to compare and rank candidates.[15]

You can usually sense that you're in a structured interview if the interviewer is reading questions from a list and recording your answers. Answer each question thoughtfully and completely; your responses will be compared with those from other candidates, and you might not have the chance to revise previous answers as the interview moves along.

In an *unstructured interview*, the interviewer adapts the line of questioning based on your responses and questions.

In contrast, an **unstructured interview** doesn't follow a predetermined sequence. It is likely to feel more conversational and personal, as the interviewer adapts the line of questioning based on your answers. You might encounter an unstructured interview after one or more structured interviews, perhaps with a potential colleague or a higher-level manager who wants to get a sense of what you would be like to work with. Take this as good news, that the company believes you can do the job and now wants to see whether you fit the culture.

Even though it may feel like a conversation, remember that it's still an interview, so keep your answers focused and professional. If you sense that the interviewer is circling back to revisit a topic, particularly an answer that you gave in an earlier interview, chances are he or she is probing an area of concern. Use this opportunity to correct or expand on your earlier answer.

Panel and Group Interviews

Interviews can also vary by the number of people involved. Most of your interviews are likely to be one-on-one conversations, although if you are invited to visit a company, you'll probably meet with a series of interviewers.

In a *panel interview*, you meet with several interviewers at once.

Some employers use panel or group interviews as well. In a **panel interview**, you answer questions from two or more interviewers in the same session. Panel interviews save time for employers and let them see how candidates perform under pressure. Facing several interviewers at once can feel intimidating, but you can minimize the "firing squad" feeling by treating it as a series of one-on-one interactions. Focus on each interviewer as you answer his or her question, and then make eye contact with the others on the panel so everyone feels included.[16]

The interviewers typically come from different parts of the organization and will have different concerns, so frame each answer in that context.[17] For example, an upper-level manager is likely to be interested in your overall business sense and strategic perspective, whereas a potential colleague might be more interested in your technical skills and ability to work in a team.

Use a panel interview as an opportunity to see how people in the company work together. Are they collegial with one another or cold and distant? Does the boss interrupt and overrule or show respect to everyone regardless of rank?

In a **group interview**, one or more interviewers meet with several candidates simultaneously. These sessions can involve group discussions and problem-solving activities. In addition to being an efficient way to interview a number of candidates, group interviews let employers see how individuals function in a group or team setting.[18] Whatever the activity, be sure to treat your fellow candidates with respect and encouragement while looking for opportunities to show leadership and demonstrate the depth of knowledge you have about the company and its needs.

In a *group interview*, you and several other candidates meet with one or more interviewers at once.

Major Categories of Interview Questions

Interviewing techniques also vary based on the types of questions you are asked. You might encounter two or more types of questions within a single interview, so be prepared to shift your answering approach if you determine that the interviewer is using different types of questions.

Behavioral Interview Questions In contrast to generic questions that can often be answered with "canned" responses, **behavioral interview questions** require candidates to craft answers based on their own experiences and attributes.[19] Because they measure actual behavior, behavioral questions are a better predictor of success on the job than traditional interview questions.[20] Regardless of the overall style of an interview, you should expect at least a few behavioral questions.

Behavioral interview questions ask you to describe how you handled situations from your past.

These questions often deal with teamwork, communication, leadership, conflict resolution, problem solving, mistakes, job commitment, and other soft-skill areas that are difficult to measure other than by someone's actual on-the-job performance.[21] To give you an idea of what these questions are like, here are some typical behavioral questions:[22]

- Tell me about a time you had to deal with a teammate who refused to do his or her share of the work.
- Describe your last high-stress project and how you dealt with the pressure.
- Explain how you resolved a communication breakdown with a boss, professor, or coworker.
- Tell me about a mistake you made on the job and how you resolved the situation and learned from the error.
- Tell me about an important goal you set for yourself and how you achieved it.

Effective answers to behavioral questions have three parts: (1) a brief summary of the situation or task, (2) the approach you took to solve the problem or meet the challenge, and (3) the results you achieved. The acronym STAR can help you remember the sequence: **S/T** for situation or task, **A** for approach, and **R** for results.[23] You are essentially telling a mini-story with a beginning, a middle, and an end. If you don't have a work-related scenario to share in response to a question, consider using something appropriate from your personal or social experience that demonstrates the skill the interviewer is asking about.

Use the STAR approach to craft answers to behavioral questions:
- **S/T**: The situation you faced or the task you were given
- **A**: The approach you took
- **R**: The results you achieved

To prepare for behavioral questions, study the job description for qualities the company is looking for; then review your work and college experiences to recall several instances in which you demonstrated these qualities. Practice your answers so that you can quickly summarize the situation, the actions you took, and the outcome of those actions.[24]

Situational Interview Questions **Situational interview questions** are similar to behavioral questions except they focus on how you would handle various situations that could arise on the job. The situations will relate closely to the job you're applying for, so the more you know about the position and the company, the better prepared you'll be.

Situational interview questions ask you to explain how you would handle various hypothetical situations.

The interviewer might not expect you to have detailed, polished responses to all these hypothetical situations, but he or she will be judging how you go about assessing situations and formulating responses. Even if you aren't familiar with the business details of a particular scenario, use common sense to imagine how experienced people in that situation would respond.

In a *case interview*, you are asked to solve a business challenge with limited time and information.

Case Interviews and Take-Home Assessments If you are interviewing at investment banks or management consulting firms, you are likely to encounter the **case interview**.[25] Rather than a series of questions, the case interview presents you with one or more problems or questions to solve. If you are pursuing jobs in these fields, you are probably already familiar with the case-based methodology.

In these interviews, you will be given information about a scenario and will be asked to make a forecast, solve a strategic dilemma, or come up with some other sort of answer. A particular case might have multiple viable answers or no right answer at all; what interviewers are really watching is how you approach the problem with limited time and limited resources. Do you assess the situation using all the information you were given? Do you make reasonable guesses about facts and figures you don't have in hand? Does your inquiry follow a logical progression?[26] Some management consulting firms and other organizations offer practice cases and interview preparation tips online; search for "case interviews."

Stress interviews are intended to let recruiters see how you handle yourself under pressure; recognize what is happening, and don't take it personally.

Stress Interviews The most unnerving type of interview is the **stress interview**, during which you might be asked questions designed to unsettle you or might be subjected to long periods of silence, criticism, interruptions, or even hostile reactions by the interviewer. The theory behind this approach is that you'll reveal how well you handle stressful situations, although some experts question whether the technique is valuable or even ethical.[27] If you find yourself in a stress interview, recognize what is happening and collect your thoughts for a few seconds before you respond. Keep in mind that the perceived attacks aren't personal but simply a way to test your responses.

INTERVIEW MEDIA

To reduce travel costs and the demands on employee time, many employers now conduct at least some stages of interviews via telephone or video. Depending on the position, you might also encounter online interviews that range from simple structured questionnaires and tests to realistic job simulations.

Interviewing by Phone

Treat a telephone interview as seriously as you would an in-person interview.

Chances are good that the screening interview and at least one interview after that will be conducted over the phone. Employers treat telephone interviews as seriously as in-person interviews, so you need to as well. Follow the advice in Table 19.2.

Interviewing by Video

Many employers use video chat for interviews as well. This method can involve live video using Skype or similar video services or some form of video conferencing. You may also encounter video interviewing systems, in which you respond to prerecorded questions online. Everything in Table 19.2 applies to video calls, plus you need to consider the following points:[28]

To get ready for a video interview, prepare the space you will be in, set up and verify the technology you'll be using, and dress as you would for an in-person interview.

- Make sure your interviewing space is clean and uncluttered. Remove anything from the walls behind you and the area around you that doesn't look professional.
- Don't sit in front of a window or other strong light source. Adjust the room lighting so that light is directed toward you, without making it glaring. You can use software to control your webcam settings to make you look great on camera.
- Make sure your video setup is ready to go. If the company asks you to use Skype or another public service, test your connection with a friend beforehand and get comfortable using it. If the company emails a link for a videoconferencing service, make

TABLE 19.2 Tips for a Successful Phone Interview

Tip	Details
Prepare your material.	Have these materials on hand: • Your résumé • Any correspondence you've had with the employer • Your research notes about the company • The job description • Note cards with key message points you'd like to make and questions you'd like to ask
Prepare your space.	Arrange a clean and quiet space to be in during the interview. As much as possible, avoid distractions from pets, other people, television, music, and other audio and visual interruptions.
Practice your answers.	Call a friend and rehearse your answers to potential questions to make sure you're comfortable saying them over the phone.
Talk on a landline if possible.	If your mobile service isn't clear and reliable, try to arrange to talk on a landline.
Schedule the interview.	As much as possible, schedule a time when you can be in your prepared space, safe from interruptions.
Dress for a business meeting.	You don't need to go full out, but don't wear sweat pants and a T-shirt. Dressing up sends a signal to your mind and body to be attentive and professional.
Answer your phone professionally.	Say "Hi, this is —" to let callers know they've reached the right person. While your job search is active, answer every call from an unknown caller as if it's a potential employer.
Maintain good posture.	Whether you sit or stand during the interview, good posture will keep you alert and keep your voice strong.
Compensate for the lack of visual nonverbal signals.	You can't use facial expressions or hand gestures for emphasis, so make sure your voice is warm, friendly, and dynamic. Smile frequently—it changes the sound of your voice and lifts your mood.
Finish each answer in a definitive way.	Don't trail off and leave the interviewer wondering whether you're finished.
Speak clearly.	Remember that the interviewer can't see you; your spoken words have to carry the entire message.
Write down essential information you get during the interview.	Don't rely on your memory for important details such as arrangements for a follow-up interview. It's fine to pause and ask, "May I take a moment to write this down?"
End on a positive note.	No matter how you think the call went, thank the interviewer for the opportunity and say you look forward to hearing from the company.

Sources: Based in part on Jon Simmons, "5 Steps to Mastering Phone Interviews," Monster, accessed 25 May 2018, www.monster.com; Larry Kim, "17 Phone Interview Tips to Guarantee a Follow-Up," *Inc.*, 24 March 2015, www.inc.com; Kate Finley, "How to Nail the Dreaded Phone Interview," *Fast Company*, 6 February 2015, www.fastcompany.com.

sure you download and install any software that might be required well before the scheduled interview time.

- Dress and groom as you would for an in-person interview. Unlike phone interviews, where you do this to boost your mood, with a video call it's essential to look like the sort of person the company wants to hire. Choose solid colors and avoid hues that are too bright or too dark (both of which can throw off the webcam's auto-exposure).
- Maintain frequent "eye contact," which means looking at the camera on your device, not at the person's face on your screen. You'll have the natural urge to look at the person's face, but on the other end it will look like you're staring off at an angle. Move the on-screen window that shows the other person's image as close as you can to the camera on your computer or device. This way you can look into the camera while still feeling like you're looking at the interviewer.
- Don't fidget or move around too much. This is distracting to the interviewer, and your microphone will pick up all the extraneous noise.

MOBILE APP
Add the **Skype** app to your phone to be ready for video interviews.

INTELLIGENT COMMUNICATION TECHNOLOGY

Improving Fairness and Finding Better Talent with Blind Auditions

Most people like to think they are unbiased and capable of making fair, objectives decisions when it comes to judging or assessing others. Unfortunately, that is far from reality. Extensive research suggests that *unconscious* or *implicit bias* is universal and that attitudes and stereotypes affect decision-making in ways that people aren't aware of. Even people who consciously go out of their way to avoid biased assumptions can be influenced by unconscious biases that have been accumulating since childhood.

Implicit bias has been a longstanding concern in job interviews and hiring decisions. A case that opened many eyes to the problem involved classical musicians auditioning for symphony orchestras. In the 1970s, women made up only 5 percent of professional symphony musicians. Orchestras gradually moved to *blind auditions*, where performers are hidden behind a curtain so the people evaluating them can hear but not see them—meaning evaluators can't make judgments based on gender, age, appearances, or anything other than how well the musicians play. Within a decade, the ratio of women had risen to 25 percent.

The concept, sometimes called *blind assessment* or *blind hiring*, is now applied across a range of industries and professions. The GapJumpers system, for example, enables job applicants to take skill auditions anonymously. The employers sponsoring the auditions have no personal information about the applicants when they judge the scores—it is strictly about talent. Applicants who do well on blind auditions are then invited to participate in a more conventional interviewing process, at which point the employers learn who they are. GapJumpers' analysis indicates that more women and more community college graduates make it through to the second stage of interviewing than they do in a traditional selection process.

Blind auditions aren't a cure-all for biased hiring, and they obviously work only during the screening stages. If used as part of a comprehensive effort to ensure fair hiring, however, they can help ensure that a broad and worthy pool of talent has more opportunities to compete for jobs.

WHAT'S YOUR TAKE?

1. How might blind auditions help companies find better talent?
2. Do you think blind auditions can reduce employment discrimination? Why or why not?

Sources: "Understanding Implicit Bias," Kirwan Institute for the Study of Race and Ethnicity, accessed 24 April 2018, kirwaninstitute.osu.edu; Sarah Fister Gale, "Turning a Blind Eye to Hiring a Good Idea," *Workforce*, 30 September 2016, www.workforce.com; GapJumpers, accessed 3 May 2017, www.gapjumpers.me; Jacquelyn Smith, "Why Companies Are Using 'Blind Auditions' to Hire Top Talent," *Business Insider*, 31 May 2015, www.businessinsider.com.

WHAT EMPLOYERS LOOK FOR IN AN INTERVIEW

The first major question employers try to answer is whether you are qualified for the position.

Interviews give employers the chance to go beyond the basic data of your résumé to get to know you better and to answer two essential questions. First, can you handle the responsibilities of the position? Naturally, the more you know about the demands of the position and the more you've thought about how your skills match those demands, the better you'll be able to respond.

The second major question employers try to answer is whether you would be a good fit in terms of personality and organizational culture.

Second, will you be a good fit with the organization and the target position? All good employers want people who are confident, dedicated, positive, curious, courteous, ethical, and willing to commit to something larger than their own individual goals. Companies also look for fit with their individual cultures. Just like people, companies have different personalities. Some are intense; others are more laid-back. Some emphasize teamwork; others expect employees to forge their own way or even compete with one another. Expectations also vary from job to job within a company and from industry to industry. An outgoing personality is essential for sales but less so for research, for instance.

Beyond these two general questions, most employers look for the qualities of professionalism described in Chapter 1. Throughout the interview process, look for opportunities to show your commitment to excellence, dependability, teamwork, etiquette, ethics, and positive attitude.

PREEMPLOYMENT TESTING AND BACKGROUND CHECKS

Preemployment tests attempt to provide objective, quantitative information about a candidate's skills, attitudes, and habits.

In an effort to improve the predictability of the selection process, many employers now conduct a variety of preemployment evaluations and investigations. Here are the types of assessments you are likely to encounter during your job search:

- **Integrity, personality, and cognitive ability tests.** Most midsize and large companies screen candidates with tests designed to ensure compatibility with the job and with the company's values. These tests can cover such areas as emotional intelligence, ethics, and problem solving.[29]

- **Job knowledge and job skills tests.** These assessments measure the knowledge and skills required to succeed in a particular position. An accounting candidate, for example, might be tested on accounting principles and legal matters (knowledge) and asked to create a simple balance sheet or income statement (skills).
- **Substance tests.** Many companies perform some level of drug and alcohol testing. If you take prescription painkillers or other medications that might trigger an alert, you will need to show proof of the prescription.[30]
- **Background checks.** In addition to testing, most companies conduct some level of background checks, including reviewing your credit record, reviewing your driving record, checking to see whether you have a criminal history, confirming your identity, and verifying your education. Note that you must consent to a background check before the company can conduct it, and if a company finds something negative, it must report that information to you and give you the opportunity to explain.[31]
- **Online searches.** Finally, you should assume that every employer will conduct a general online search on you. To help prevent a background check from tripping you up, verify that your college transcripts are current, look for any mistakes or outdated information in your credit record, plug your name into multiple search engines to see whether anything embarrassing shows up, and scour your social network profiles and connections for potential problems. Some companies have asked applicants for the passwords to their social media accounts, but a number of states have begun to outlaw this practice.[32]

Google yourself before employers do; you need to know what they are likely to find when they study your online presence.

If you're concerned about any preemployment test, ask the employer for more information or ask your college career center for advice. You can also get more information from the U.S. Equal Employment Opportunity Commission (EEOC) at www.eeoc.gov.

Preparing for a Job Interview

Now that you're armed with insights into the interviewing and assessment process, you're ready to begin preparing for your interviews. Preparation will help you feel more confident and perform better under pressure, and it starts with learning about the organization.

3 LEARNING OBJECTIVE
List six tasks you need to complete to prepare for a successful job interview.

LEARNING ABOUT THE ORGANIZATION AND THE POSITION

You've already done some initial research to identify companies of interest, but when you're invited to an interview, it's time to dig a little deeper (see Table 19.3 on the next page). Making this effort demonstrates your interest in the company, and it identifies you as a business professional who knows the importance of investigation and analysis.

Interviewers expect you to know some basic information about the company and its industry.

In addition to learning about the company and the job opening, try to find out as much as you can about the managers who will be interviewing you, if you can get their names. Search LinkedIn in particular. As noted earlier, it's also perfectly acceptable to ask your recruiting contact at the company for the names and titles of the people who will be interviewing you. Think about ways to use whatever information you find during your interview. For example, if an interviewer lists membership in a particular professional organization, you might ask whether the organization is a good forum for people to learn about vital issues in the profession or industry. This question gives the interviewer an opportunity to talk about his or her own interests and experiences for a moment, which builds rapport and might reveal vital insights into the career path you are considering. Just make sure your questions are sincere and not uncomfortably personal.

Check out the "Five-Minute Guide to Preparing for Job Interviews" at the end of the chapter.

THINKING AHEAD ABOUT QUESTIONS

Planning ahead for the interviewer's questions will help you handle them more confidently and successfully. In addition, you will want to prepare insightful questions of your own.

TABLE 19.3 Investigating an Organization and a Job Opportunity

Where to Look and What You Can Learn

- *Company website, blogs, and social media accounts:* Overall information about the company, including key executives, products and services, locations and divisions, employee benefits, job descriptions
- *Competitors' websites, blogs, and social media accounts:* Similar information from competitors, including the strengths these companies claim to have
- *Industry-related websites and blogs:* Objective analysis and criticism of the company, its products, its reputation, and its management
- *Marketing materials (print and online):* The company's marketing strategy and customer communication style
- *Company publications (print and online):* Key events, stories about employees, new products
- *Your social network contacts:* Names and job titles of potential contacts within a company
- *Periodicals (newspapers and trade journals, both print and online):* In-depth stories about the company and its strategies, products, successes, and failures; you may find profiles of top executives
- *Career center at your college:* Often provides a wide array of information about companies that hire graduates
- *Current and former employees:* Insights into the work environment

Points to Learn About the Organization

- Full name
- Location (headquarters and divisions, branches, subsidiaries, or other units)
- Ownership (public or private; whether it is owned by another company)
- Brief history
- Products and services
- Industry position (whether the company is a leader or a minor player; whether it is an innovator or more of a follower)
- Key financial points (such as stock price and trends, if a public company)
- Growth prospects (whether the company is investing in its future through research and development; whether it is in a thriving industry)

Points to Learn About the Position

- Title
- Functions and responsibilities
- Qualifications and expectations
- Possible career paths
- Salary range
- Travel expectations and opportunities
- Relocation expectations and opportunities

Planning for the Employer's Questions

You can expect to face several common questions in your interviews, so be sure to prepare for them.

Many general interview questions are "stock" queries you can expect to hear again and again during your interviews. Get ready to face variations of these six at the very least:

- **What is the hardest decision you've ever had to make?** Be prepared with a good example (that isn't too personal), explaining why the decision was difficult, how you made the choice you made, and what you learned from the experience. The STAR approach is perfect for this.
- **What is your greatest weakness?** This question seems to be a favorite of some interviewers, although it probably rarely yields definitive information as it's unlikely that many candidates will answer with a weakness that ruins their chances. Two effective approaches are answering with something that is minor and unrelated to the core responsibilities of the job or mentioning a shortcoming that you had in the past but took steps to remedy.[33] You can also mention a skill you plan to develop without characterizing it as a weakness.
- **Where do you want to be five years from now?** This question tests (1) whether you've given thought to your long-term goals and (2) whether you're merely using this job as a stopover until something better comes along. While being truthful, frame your answer in a way that expresses your enthusiasm for the position and your desire to build a career with the company.[34]
- **What didn't you like about previous jobs you've held?** Answer this one carefully: The interviewer is trying to predict whether you'll be an unhappy or difficult employee.[35] Describe something that you didn't like in a way that puts you in a positive light, such as having limited opportunities to apply your skills or education. Avoid making negative comments about former employers or colleagues.

MOBILE APP

The **CareerBuilder** app lets you search and apply for jobs from your phone or tablet.

- **Tell me something about yourself.** One good strategy is to briefly share the "story of you" (see page 519)—quickly summarizing where you have been and where you would like to go—in a way that aligns your interests with the company's. Alternatively, you can focus on a specific skill you know is valuable to the company, share something relevant to the business that you are passionate about, or offer a short summary of what colleagues or customers think about you.[36] Whatever tactic you choose, this is not the time to be shy or indecisive, so be ready with a confident, memorable answer.
- **How do you spend your free time?** This question can pop up late in an interview, after the interviewer has covered the major work-related questions and wants to get a better idea of what sort of person you are.[37] Prepare an answer that is honest and that puts you in a positive light without revealing more than you are comfortable revealing or suggesting that you might not fit in the corporate culture. Sports, hobbies, reading, spending time with family, and volunteer work are all "safe" answers.

Continue your preparation by planning a brief answer to each question in Table 19.4. Use the STAR approach (page 561) to frame your responses as mini-stories.

Look for ways to frame your responses as brief stories rather than as dry facts or statements.

Planning Questions of Your Own

Remember that an interview is a two-way conversation. By asking insightful questions, you can demonstrate your understanding of the organization, steer the discussion into areas that allow you to present your qualifications to best advantage, and verify for yourself whether this is a good opportunity. You can also use questions to demonstrate your ability to assess and explore important business issues.[38] Interviewers also expect you

Preparing questions of your own helps you understand the company and the position, and it sends an important signal that you take the opportunity seriously.

TABLE 19.4 Twenty-Five Common Interview Questions

Questions About College
1. What courses in college did you like most? Least? Why?
2. Do you think your extracurricular activities in college were worth the time you spent on them? Why or why not?
3. When did you choose your college major? Did you ever change your major? If so, why?
4. Do you feel you did the best scholastic work you are capable of?
5. How has your college education prepared you for this position?
Questions About Employers and Jobs
6. Why did you leave your last job?
7. Why did you apply for this job opening?
8. Why did you choose your particular field of work?
9. What are the disadvantages of your chosen field?
10. What do you know about our company?
11. What do you think about how this industry operates today?
12. Why do you think you would like this particular type of job?
Questions About Work Experiences and Expectations
13. What was your biggest failure?
14. What is your biggest weakness?
15. Describe an experience in which you learned from one of your mistakes.
16. What motivates you? Why?
17. What would past managers or colleagues say about you?
18. What have you done that shows initiative and willingness to work?
19. Why should we hire you?
Questions About Work Habits
20. Do you prefer working with others or by yourself?
21. What type of boss do you prefer?
22. Have you ever had any difficulty getting along with colleagues or supervisors? With instructors? With other students?
23. What would you do if you were given an unrealistic deadline for a task or project?
24. How do you feel about overtime work?
25. How do you handle stress or pressure on the job?

Sources: "50 Most Common Interview Questions," Glassdoor, 25 March 2016, www.glassdoor.com; Liz Ryan, "How to Answer Ten Common Interview Questions—with Confidence," *Forbes*, 9 December 2017, www.forbes.com; Carole Martin, "Answers to 10 Most Common Interview Questions," Monster, accessed 25 April 2018, www.monster.com.

TABLE 19.5 Ten Questions to Consider Asking an Interviewer

Question	Reason for Asking
1. How does this job fit in the overall department or organization?	A vague answer could mean that the responsibilities have not been clearly defined, which is almost guaranteed to cause frustration if you take the job.
2. What have past employees done to excel in this position?	This will help you go beyond the job description to understand what the company really wants.
3. How do you measure success for someone in this position?	A vague or incomplete answer could mean that the expectations you will face are unrealistic or ill defined.
4. What is the first problem that needs the attention of the person you hire?	Not only will this help you prepare, but it can also signal whether you're about to jump into a problematic situation.
5. How well do my qualifications align with the current and future needs of this position?	This gives you the opportunity to address any unspoken concerns the interviewer might have.
6. Why is this job now vacant?	If the previous employee got promoted, that's a good sign. If the person quit, that might not be such a good sign.
7. What makes your organization different from others in the industry?	The answer will help you assess whether the company has a clear strategy to succeed in its industry and whether top managers communicate this to lower-level employees.
8. How would you define your organization's managerial philosophy?	You want to know whether the managerial philosophy is consistent with your own working values.
9. What is a typical workday like for you?	The interviewer's response can give you clues about daily life at the company.
10. What are the next steps in the selection process? What's the best way to follow up with you?	Knowing where the company is in the hiring process will give you clues about following up after the interview and possibly give you hints about where you stand.

Sources: Courtney Connley, "5 Things You Should Ask During Every Job Interview," *Black Enterprise*, June 2016, 29; Jacquelyn Smith and Natalie Walters, "The 29 Smartest Questions to Ask at the End of Every Job Interview," *Business Insider*, 28 January 2016, www.businessinsider.com; Heather Huhman, "5 Must-Ask Questions at Job Interviews," Glassdoor blog, 7 February 2012, www.glassdoor.com.

to ask questions, and they tend to look negatively on candidates who don't have any questions to ask. For good questions that you can use as a starting point, see Table 19.5. Put your questions in the context of what you have learned about the company and the position, and avoid asking questions that can be easily answered on the company's website or in the job posting.

BOOSTING YOUR CONFIDENCE

The best way to build your confidence is to prepare thoroughly and address shortcomings as best you can.

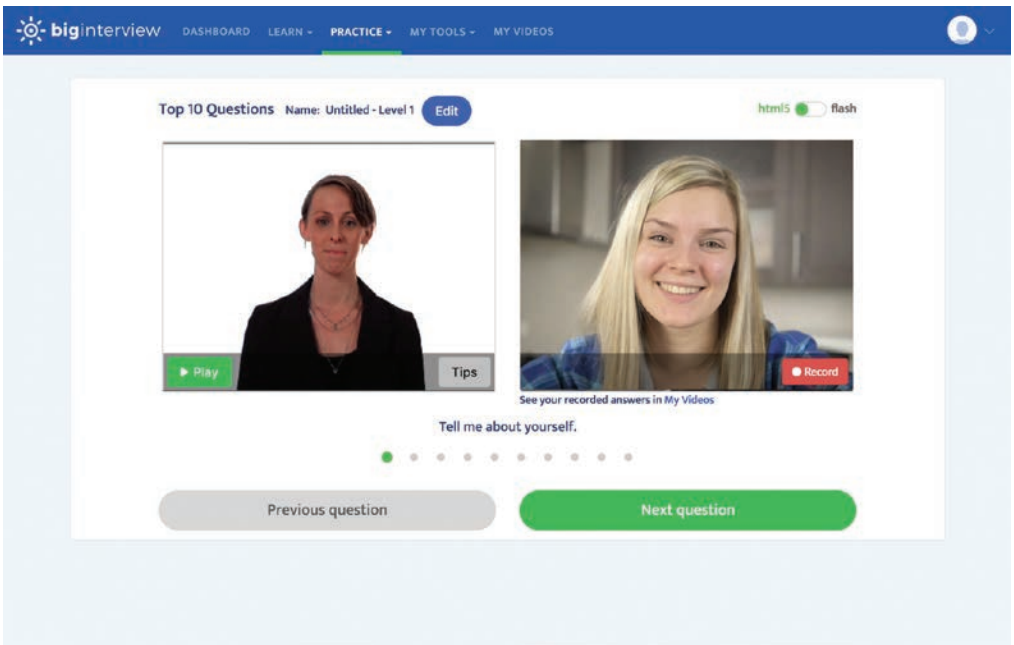
Interviewing can be stressful, so some nervousness is natural. However, you can take steps to feel more confident. Start by reminding yourself that you have value to offer the employer and that the employer already thinks highly enough of you to invite you to an interview.

If some aspect of your appearance or background makes you uneasy, correct it if possible or offset it by emphasizing positive traits, such as warmth, wit, intelligence, or charm. Instead of dwelling on your weaknesses, focus on your strengths. Instead of worrying about how you will perform in the interview, focus on how you can help the organization succeed. As with public speaking, the more prepared you are, the more confident you'll be.

POLISHING YOUR INTERVIEW STYLE

Staging mock interviews is a good way to hone your style and boost your confidence.

Competence and confidence are the foundation of your interviewing style, and you can enhance them by giving the interviewer an impression of poise, good manners, and good judgment. You can develop a smooth style by staging mock interviews with a friend or using an interview simulator (see Figure 19.4). Record these mock interviews so you can evaluate yourself. Your college's career center may have computer-based systems for practicing interviews as well.



Screenshot Big Interview

Figure 19.4 Interview Simulators
Job interview simulators can help you practice your responses to common interview questions and fine-tune your interviewing skills.

After each practice session, look for opportunities to improve. Make sure your answers are clear, concise, and on-topic. Have your mock interview partner critique your performance, or critique yourself if you're able to record your practice interviews, using the list of warning signs shown in Table 19.6.

After each practice session, evaluate the length and clarity of your answers, your nonverbal behavior, and the quality of your voice.

In addition to reviewing your answers, evaluate your nonverbal behavior, including your posture, eye contact, facial expressions, and hand gestures and movements. Do you come across as alert and upbeat or passive and withdrawn? Pay close attention to your speaking voice as well. If you tend to speak in a monotone, for instance, practice speaking in a livelier style, with more inflection and emphasis. And watch out for fillers such as *uh* and *um*. Many people start sentences with a filler without being conscious of doing so.

TABLE 19.6 Warning Signs: 25 Attributes Interviewers Don't Like to See

1. Poor personal appearance
2. Overbearing, overaggressive, or conceited demeanor; a "superiority complex"; a know-it-all attitude
3. Inability to express ideas clearly; poor voice, diction, or grammar
4. Lack of knowledge or experience
5. Poor preparation for the interview
6. Lack of interest in the job
7. Lack of planning for career; lack of purpose or goals
8. Lack of enthusiasm; passive and indifferent demeanor
9. Lack of confidence and poise; appearance of being nervous and ill at ease
10. Insufficient evidence of achievement
11. Failure to participate in extracurricular activities
12. Overemphasis on money or discussing salary and benefits too early in the process
13. Poor scholastic record
14. Unwillingness to start at the bottom; expecting too much too soon
15. Tendency to make excuses
16. Evasive answers; hedging on unfavorable factors in record
17. Lack of tact
18. Lack of maturity
19. Lack of courtesy and common sense, including answering mobile phones, texting, or chewing gum during the interview
20. Being critical of past or present employers
21. Lack of social skills
22. Marked dislike for schoolwork
23. Lack of vitality
24. Failure to maintain comfortable eye contact
25. Weak or overly aggressive handshake

Sources: Daniel Bortz, "7 Rookie Job Interview Mistakes You Need to Avoid," Monster, accessed 3 June 2019, www.monster.com; Donna Fuscaldo, "Seven Deadly Interview Sins," Glassdoor blog, 4 April 2012, www.glassdoor.com; "CareerBuilder Releases Annual List of Strangest Interview and Body Language Mistakes," CareerBuilder.com, 12 January 2017, www.careerbuilder.com; *The Northwestern Endicott Report* (Evanston, Ill.: Northwestern University Placement Center).

Train yourself to pause silently for a moment instead as you gather your thoughts and plan what to say.

PRESENTING A PROFESSIONAL IMAGE

Dress in a way that shows you understand the company's norms; a safe approach is to dress just a bit more formally than employees do.

Clothing and grooming are important elements of preparation because they reveal something about a candidate's personality, professionalism, and ability to sense the unspoken rules of a situation. Your research into various industries and professions should give you insight into expectations for business attire. If you're not sure what to wear, ask someone who works in the same industry, call the company's receptionist, or even visit the company at the end of the day and see what employees are wearing as they leave the office. However, if they are dressed extremely casually, plan to dress a notch or two above that. You don't need to spend a fortune on interview clothes, but your clothes must be clean, ironed, and appropriate. The following look will serve you well in just about any interview situation:[39]

- Hairstyle appropriate for the industry and the profession
- For more formal environments and for many professional or managerial positions, a conservative business suit (for women, that means no exposed midriffs, short skirts, or plunging necklines) in a dark solid color or a subtle pattern such as pinstripes; understated tie for men; coordinated blouse for women
- For less formal environments, smart-looking "business casual," including a pressed shirt or blouse and nice slacks or a skirt
- Stylish but professional-looking shoes (no extreme high heels, exposed toes, or casual shoes)
- Clean hands and nicely trimmed fingernails
- Little or no perfume or cologne (some people are allergic, and many people are put off by strong smells)
- Limited accessories
- Subtle makeup
- Exemplary personal hygiene

Use style and grooming choices to send the signal that you are a serious professional.

If you're not sure how formal a company is, bring a blazer that you can wear to dress up or carry to dress down. Whatever the style, remember that an interview is not the place to express your individuality or to let your inner rebel run wild. To be taken seriously, send a clear signal that you understand the business world and know how to adapt to it.

BEING READY WHEN YOU ARRIVE

Be ready to go as soon as you arrive at the interviewing site; don't fumble around for your résumé or your list of questions.

When you go to your interview, take a small notebook, a pen, a list of the questions you want to ask, several copies of your résumé (protected in a folder), an outline of what you have learned about the organization, and any past correspondence about the position. You may also want to take a small calendar, a transcript of your college grades, a list of references, and a portfolio containing samples of your work, performance reviews, and certificates of achievement.[40]

Be sure you know when and where the interview will be held. The worst way to start any interview is to be late. Verify the route and time required to get there, even if that means traveling there ahead of time. Plan to arrive early, but don't approach the reception desk until five minutes or so before your appointed time.[41] Chances are the interviewer won't be ready to receive you until the scheduled time.

If you have to wait for the interviewer, use this time to review the key messages about yourself that you want to get across in the interview. Conduct yourself professionally while waiting. Turn off your phone, show respect for everyone you encounter, and avoid chewing gum, eating, or drinking. Anything you do or say at this stage may get back to the interviewer, so make sure your best qualities show from the moment you enter the premises. To review the steps for planning a successful interview, see "Checklist: Planning for a Successful Job Interview."

CHECKLIST ✓ Planning for a Successful Job Interview

- Learn about the organization, including its operations, markets, and challenges.
- Learn as much as you can about the people who will be interviewing you if you can find their names.
- Plan for the employer's questions, including questions about tough decisions you've made, your perceived shortcomings, what you didn't like about previous jobs, and your career plans.
- Plan questions of your own to find out whether this is really the job and the organization for you and to show that you've done your research.
- Bolster your confidence by removing as many sources of apprehension as you can.
- Polish your interview style by staging mock interviews.
- Present a professional appearance with appropriate dress and grooming.
- Be ready when you arrive and bring along a pen, paper, a list of questions, copies of your résumé, an outline of your research on the company, and any correspondence you've had regarding the position.
- Double-check the location and time of the interview, and map out the route beforehand.
- Relax and be flexible; the schedule and interview arrangements may change when you arrive.

Interviewing for Success

At this point, you have a good sense of the overall process and know how to prepare for your interviews. The next step is to get familiar with the three stages of every interview: the warm-up, the question-and-answer session, and the close.

4 LEARNING OBJECTIVE
Explain how to succeed in all three stages of an interview.

THE WARM-UP

The warm-up stage doesn't have any official time boundary but constitutes the first few minutes of the interview as you meet the interviewer and settle into place. It might occur while you're walking from the lobby to a conference room or the interviewer's office and continue while you take your seats and move into a more formal conversation. Don't let your guard down if the interviewer engages in what feels like small talk; these exchanges are every bit as important as structured questions.

The first few minutes of the interview might feel like small talk, but the interviewer is forming an impression of you, so respond with positive body language, a warm smile, and thoughtful answers.

Show positive body language and a warm smile to create a positive first impression. When the interviewer extends a hand, respond with a firm but not overpowering handshake. Repeat the interviewer's name when you're introduced ("It's a pleasure to meet you, Ms. Litton"). Wait until you're asked to be seated or the interviewer has taken a seat. Let the interviewer start the discussion, and be ready to answer one or two substantial questions right away. Here are some questions that you might hear during the warm-up stage:[42]

- Why do you want this job?
- Why do you want to work here?
- What do you know about us?
- Tell me a little about yourself.
- Why should we hire you?

You might face substantial questions as soon as your interview starts, so make sure you are prepared and ready to go.

You'll probably feel nervous and have the urge to race through your answers, but remember to breathe slowly and take a second to respond. After you move through the first couple of questions, you should start to feel more comfortable.

THE QUESTION-AND-ANSWER STAGE

The bulk of the interview is likely to be a series of questions in which the interviewer asks about your qualifications, discusses some of the points mentioned in your résumé, and asks how you have handled particular situations in the past (behavioral questions) or would handle them in the future (situational questions). You'll also be asking questions of your own.

Answering and Asking Questions

Listen carefully to questions before you answer.

Let the interviewer lead the conversation, and never answer a question before he or she has finished asking it. Not only is this type of interruption rude, but the last few words of the question might alter how you respond. As much as possible, avoid one-word yes-or-no answers. Look for opportunities to expand on an earlier positive response or explain a negative response. If you're asked a difficult or offbeat question, pause before responding. Think through the implications of the question. For instance, the recruiter may know that you can't answer a question and only wants to see whether you can construct a logical approach to solving a problem.

Whenever you're asked whether you have any questions, or whenever doing so naturally fits the flow of the conversation, ask a question from the list you've prepared. Probe for what the company is looking for in its new employees so that you can show how you meet the firm's needs. Also try to zero in on any reservations that you sense the interviewer might have about you so that you can dispel them.

Listening to the Interviewer

Paying attention to both verbal and nonverbal messages can help you turn the question-and-answer stage to your advantage.

Active listening (see Chapter 2) can help you gauge the interviewer's mood and uncover any unspoken concerns. Facial expressions, eye movements, gestures, and posture may tell you the real meaning of what is being said. Be especially aware of how your answers are received. Does the interviewer nod in agreement or smile to show approval? If so, you're making progress. If not, you might want to expand an answer or ask if you've understood the question correctly.

Handling Potentially Discriminatory Questions

Federal, state, and local laws prohibit employment discrimination based on a variety of factors, and well-trained interviewers know to avoid questions that could be used to discriminate in the hiring process.

Although it's less likely to happen in a firm with well-trained interviewers, you might encounter a question you consider discriminatory. A variety of federal, state, and local laws prohibit employment discrimination on the basis of race, ethnicity, gender, age, marital status, religion, national origin, or disability. Interview questions designed to elicit information on these topics are potentially illegal.[43] Table 19.7 compares some specific questions that employers are and are not allowed to ask during an employment interview.

TABLE 19.7 Acceptable Versus Potentially Discriminatory Interview Questions

Interviewers May Ask This . . .	But Not This
What is your name?	What was your maiden name?
Are you over 18?	When were you born?
Did you graduate from high school?	When did you graduate from high school?
[Questions about race are not allowed.]	What is your race?
Can you perform [specific tasks]?	Do you have physical or mental disabilities?
[Questions about alcohol use are not allowed.]	Do you drink alcoholic beverages?
Are you currently using illegal drugs?	Have you ever been addicted to drugs in the past?
Would you be able to meet the job's requirement to frequently work weekends (or evenings)?	Would working on weekends conflict with your religion?
[Questions about marital status are not allowed.]	Are you married?
Do you have the legal right to work in the United States?	What country are you a citizen of?
Have you ever been convicted of a felony?	Have you ever been arrested?
This job requires that you speak Spanish. Do you?	What language did you speak in your home when you were growing up?
What is your current address, and how long have you lived there?	Do you own or rent your home?

Sources: "Illegal Interview Questions," Betterteam, 7 January 2018, www.betterteam.com; Dave Johnson, "Illegal Job Interview Questions," *CBS Money Watch*, 27 February 2012, www.cbsnews.com; "5 Illegal Interview Questions and How to Dodge Them," *Forbes*, 20 April 2012, www.forbes.com; Vivian Giang, "11 Common Interview Questions That Are Actually Illegal," *Business Insider*, 5 July 2013, www.businessinsider.com.

If an interviewer asks a potentially unlawful question, consider your options before you respond. You can refuse to answer it, you can answer it and move on, or you can try to identify why the interviewer might have asked it.[44] For example, if an interviewer inappropriately asks whether you are married or have strong family ties in the area, he or she might be trying to figure out if you're willing to travel or relocate—both of which are acceptable questions. You could respond by asking whether there are concerns about travel or relocation.

Think about how you might respond if you are asked a potentially unlawful question.

Even if you do answer the question as it was asked, think hard before accepting a job offer from this company if you have alternatives. Was the off-limits question possibly accidental (it happens, particularly during casual exchanges over meals) and therefore not really a major concern? If you think it was intentional, would you want to work for an organization that condones illegal or discriminatory questions or that doesn't train its employees to avoid them?

If you believe an interviewer's questions to be unreasonable, unrelated to the job, or an attempt to discriminate, you have the option of filing a complaint with the EEOC or with the agency in your state that regulates fair employment practices.

THE CLOSE

Like the warm-up, the end of the interview is more important than its brief duration would indicate. These last few minutes are your final opportunity to emphasize your value to the organization and to correct any misconceptions the interviewer might have. Be aware that many interviewers will ask whether you have any more questions at this point, so save one or two from your list.

MOBILE APP
The **Monster** app offers helpful tips to help you prepare for your next job interviews.

Concluding Gracefully

You can usually tell when the interviewer is moving to end to the interview. He or she may ask whether you have any more questions, check the time, summarize the discussion, or simply tell you that the allotted time for the interview is up. When you get the signal, be sure to thank the interviewer for the opportunity and express your interest in the organization. If you can do so comfortably, try to pin down what will happen next, but don't press for an immediate decision.

Conclude an interview with courtesy and enthusiasm; ask questions if you're not sure about what will happen next.

If this is your second or third interview, it may end with a job offer. If you have other offers or need time to think about this offer, it's perfectly acceptable to thank the interviewer for the offer and ask for some time to consider it. If no job offer is made, the interview team may not have reached a decision yet, but you may tactfully ask when you can expect to know the decision.

Discussing Salary

Before you reach the interview stage, you should have a salary range in mind based on the research you've done into the position. If you're asked about your salary requirements and aren't ready to name a figure, you can say that you would expect compensation in line with industry norms for someone with your experience.

Research salary ranges in your job, industry, and geographic region before you try to negotiate salary.

How far you can negotiate depends on several factors, including the market demand for your skills, the strength of the job market, the company's compensation policies, the company's financial health, and any other job offers you may be considering. If you're comparing offers, be sure to consider the entire compensation and benefits package. And remember that you're negotiating a business deal, not asking for personal favors, so focus on the unique value you can bring to the job. The more information you have, the stronger your position will be.

Negotiating benefits may be one way to get more value from an employment package.

INTERVIEW NOTES

Maintain a notebook or simple database with information about each company, interviewers' answers to your questions, contact information for each interviewer, the status of follow-up communication, and upcoming interview appointments. Carefully organized notes will help you decide which company is the right fit for you when it comes time to choose from among the job offers you receive.

Keep careful notes during your job search so you don't miss deadlines or commit other mistakes.

To review the important tips for successful interviews, see "Checklist: Making a Positive Impression in Job Interviews."

CHECKLIST Making a Positive Impression in Job Interviews

A. Be ready to make a positive impression in the warm-up stage.

- Be alert from the moment you arrive; even initial small talk is part of the interviewing process.
- Greet the interviewer by name, with a smile and direct eye contact.
- Offer a firm (not crushing) handshake if the interviewer extends a hand.
- Take a seat only after the interviewer invites you to sit or has taken his or her own seat.
- Listen for clues about what the interviewer is trying to get you to reveal about yourself and your qualifications.
- Exhibit positive body language, including standing up straight, walking with purpose, and sitting up straight.

B. Convey your value to the organization during the question-and-answer stage.

- Let the interviewer lead the conversation.
- Never answer a question before the interviewer finishes asking it.
- Listen carefully to the interviewer and watch for nonverbal signals.
- Don't limit yourself to simple yes-or-no answers; expand on the answer to show your knowledge of the company (but don't ramble on).
- If you encounter a potentially discriminatory question, decide how you want to respond before you say anything.
- When you have the opportunity, ask questions from the list you've prepared; remember that interviewers expect you to ask questions.

C. Close on a strong note.

- Watch and listen for signs that the interview is about to end.
- Quickly evaluate how well you've done, and correct any misperceptions the interviewer might have.
- If you receive an offer and aren't ready to decide, it's entirely appropriate to ask for time to think about it.
- Don't bring up salary, but be prepared to discuss it if the interviewer raises the subject.
- End with a warm smile and a handshake, and thank the interviewer for meeting with you.

Following Up After an Interview

5 LEARNING OBJECTIVE
Identify the most common employment messages that follow an interview, and explain when you would use each one.

Staying in contact with a prospective employer after an interview shows that you really want the job and are motivated to get it. Doing so also gives you another chance to demonstrate your communication skills and sense of business etiquette. Following up brings your name to the interviewer's attention once again and reminds him or her that you're actively looking and waiting for the decision.

Whenever you hear from a company during the application or interview process, be sure to respond quickly, even if it's only to ask for more time. If a company doesn't hear back from you within 24 hours, it might move on to the next candidate.[45]

FOLLOW-UP MESSAGE

A follow-up message is another chance to promote yourself to an employer.

Send a follow-up message within two days of the interview, even if you feel you have little chance of getting the job. Such messages are often referred to as "thank-you notes," but they give you an important opportunity to go beyond merely expressing your appreciation (see Figure 19.5). You can use the message to reinforce the reasons you are a good choice for the position, modify any answers you gave during the interview if you realize you made a mistake or have changed your mind, and respond to any negatives that might have arisen in the interview.[46] Email is usually acceptable for follow-up messages, unless the interviewer has asked you to use other media.

MESSAGE OF INQUIRY

You can inquire about the hiring decision if you haven't heard by the promised date.

If you're not advised of the interviewer's decision by the promised date or within two weeks, you might make an inquiry. A message of inquiry (which can be handled by email if the interviewer has given you his or her email address) is particularly



Figure 19.5 Follow-Up Message: Ineffective and Effective
Use the follow-up message after an interview to express continued interest in the opportunity, to correct or expand on any information you provided in the interview, and to thank the interviewer for his or her time.

appropriate if you've received a job offer from a second firm and don't want to accept it before you have an answer from the first. The following example illustrates an effective approach:

> When we talked on April 7 about the fashion coordinator position in your Park Avenue showroom, you indicated that a decision would be made by May 1. I am still enthusiastic about the position and eager to know what conclusion you've reached. ← Provides enough information to remind the reader about the previous discussion
>
> To complicate matters, another firm has now offered me a position and has asked that I reply within the next two weeks. ← Introduces the sense of urgency

Would it be possible to hear your decision by Thursday, May 12? If you need more information from me before then, please let me know.

← Makes a courteous request for specific action

REQUEST FOR A TIME EXTENSION

If you receive a job offer while other interviews are still pending, you can ask the employer for a time extension. Open with a strong statement of your continued interest in the job, ask for more time to consider the offer, provide specific reasons for the request, and assure the reader that you will respond by a specific date (see Figure 19.6).

LETTER OF ACCEPTANCE

Confirm important details when writing a letter of acceptance.

When you receive a job offer you want to accept, reply in writing to confirm all the important details. Begin by accepting the position and expressing thanks. Identify the job you're accepting. In the next paragraph, cover any necessary details. Conclude by saying that you look forward to reporting for work. As always, a positive letter should convey your enthusiasm and eagerness to cooperate:

I'm delighted to accept the graphic design position in your advertising department at the salary of $3,875 per month.

← Confirms the specific terms of the offer with a good-news statement at the beginning

I am enclosing the health insurance forms you asked me to complete and sign. I've already given notice to my current employer and will be able to start work on Monday, January 18.

← Covers miscellaneous details in the body

The prospect of joining your firm is exciting. Thank you for giving me this opportunity, and I look forward to making a positive contribution.

← Closes with another reference to the good news and a look toward the future

Written acceptance of a job offer can be considered a legally binding contract, so make sure you intend to take the job.

Be aware that a job offer and a written acceptance of that offer can constitute a legally binding contract, for both you and the employer. Before you send an acceptance letter, be sure you want the job.

LETTER DECLINING A JOB OFFER

If you decide to decline a job offer, do so tactfully.

As you progress through your interviews, you may find that you need to write a letter declining a job offer. Use the techniques for negative messages (see Chapter 11): Open warmly, state the reasons for refusing the offer, decline the offer explicitly, and close on a pleasant note that expresses gratitude. By taking the time to write a sincere, tactful letter, you leave the door open for future contact:

Thank you for your hospitality during my interview at your Durham facility last month. I'm flattered that you would offer me the systems analyst position that we talked about.

← Uses a buffer in the opening paragraph

I was fortunate to receive two job offers during my search. Because my desire to work abroad can more readily be satisfied by another company, I have accepted that job offer.

← Precedes the bad news with tactfully phrased reasons for the applicant's unfavorable decision

I deeply appreciate the time you spent talking with me. Thank you again for your consideration and kindness.

← Lets the reader down gently with a sincere and cordial ending

Letters of resignation should always be written in a gracious and professional tone that avoids criticism of your employer or your colleagues.

LETTER OF RESIGNATION

If you get a job offer while employed, you can maintain good relations with your current employer by writing a thoughtful letter of resignation to your immediate supervisor. Follow the advice for negative messages, and make the letter sound positive, regardless of how you feel. Say something favorable about the organization, the people you work with,

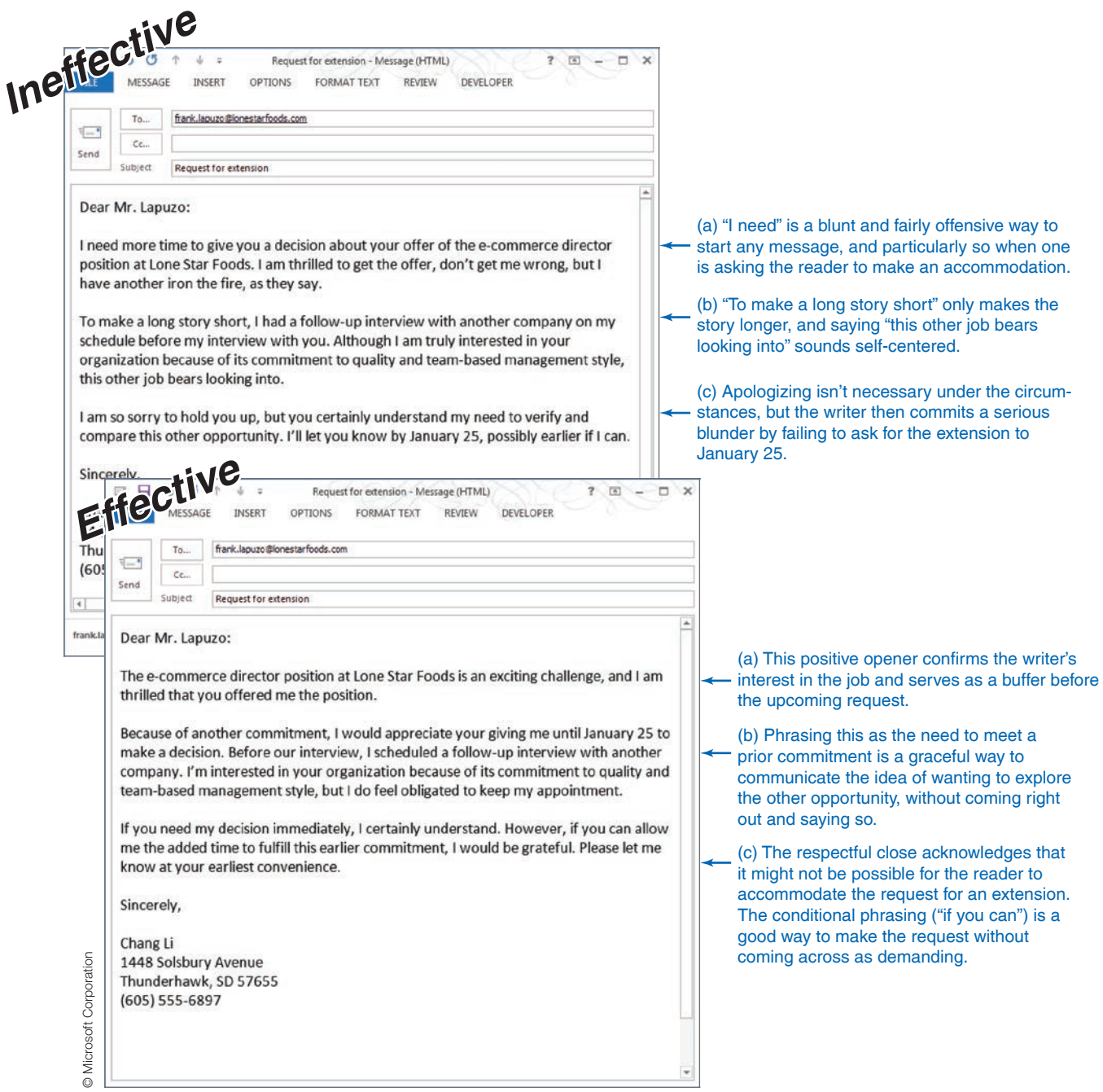


Figure 19.6 Request for a Time Extension: Ineffective and Effective
Needing more time to decide on a job offer is not uncommon, particularly for candidates with desirable credentials. Make the request in a respectful and subtle way. The reader understands you are comparing opportunities and looking for the best offer, so you don't need to belabor this point.

or what you've learned on the job. Then state your intention to leave and give the date of your last day on the job. Be sure you give your current employer at least two weeks' notice:

> My sincere thanks to you and to all the other Emblem Corporation employees for helping me learn so much about serving the public these past two years. You have given me untold help and encouragement.

← Uses an appreciative opening to serve as a buffer

You may recall that when you first interviewed me, my goal was to become a customer relations supervisor. Because that opportunity has been offered to me by another organization, I am submitting my resignation. I will miss my friends and colleagues at Emblem, but I want to take advantage of this opportunity.

← States reasons before the bad news itself, using tactful phrasing to help keep the relationship friendly, should the writer later want letters of recommendation

I would like to terminate my work here two weeks from today (June 13) but can arrange to work an additional week if you want me to train a replacement.

← Discusses necessary details in an extra paragraph

My sincere thanks and best wishes to all of you.

← Tempers the disappointment with a cordial close

To verify the content and style of your follow-up messages, consult the tips in "Checklist: Communicating After an Interview."

CHECKLIST ✓ Communicating After an Interview

A. Follow-up messages
- Write a brief follow-up message to say thank you within two days of the interview.
- Acknowledge the interviewer's time and courtesy.
- Restate the specific job you're applying for.
- Express your enthusiasm about the organization and the job.
- Add any new information that may help your chances.

B. Messages of inquiry
- If you haven't heard from the interviewer by the promised date or within two weeks, write a brief message of inquiry.
- Use the direct approach: main idea, necessary details, and specific request.

C. Requests for a time extension
- Request an extension if you have other interviews scheduled and need time to decide about an offer.
- Open on a positive note that reiterates your interest in the job.
- Explain why you need more time.
- In the close, promise a decision by a specific date.

D. Letters of acceptance
- State clearly that you accept the offer, identify the job you're accepting, and confirm vital details such as salary and start date.
- Make sure you want the job; an acceptance letter can be treated as a legally binding contract.

E. Letters declining a job offer
- Use the indirect approach for negative messages.
- Open on a warm and appreciative note, and then explain why you are refusing the offer.
- End on a sincere, positive note.

F. Letters of resignation
- Send a letter of resignation to your current employer as soon as possible.
- Begin with an appreciative buffer.
- Say something favorable about your experience with the organization.
- State your intention to leave, and give the date of your last day on the job.
- Close cordially.

COMMUNICATION CHALLENGES AT Patreon

You work as a recruiter in the human resources department at Patreon, and the company is currently expanding its roster of customer support professionals. Use what you've learned about interviewing to address these challenges.

INDIVIDUAL CHALLENGE: Customer support employees can get hit with some off-the-wall questions and requests from time to time, and you want to make sure the people you hire can handle these questions with grace and tact. Come up with three fairly outlandish questions you could use during interviews to see how candidates react. You're not particularly interested in precise answers; you want to see how they handle the situation and how they go about solving odd challenges. For example, you might ask them to estimate how many mobile phone batteries will be thrown away in the next 10 years or to explain the concept of a human family to an alien from another planet.

TEAM CHALLENGE: With your team, brainstorm the soft-skill attributes of an ideal customer service specialist, such as active listening and communicating with people who have different native languages. (Review Chapters 2 and 3 for ideas.) Next, write five interview questions that could help you judge how well candidates match this profile.

Key Terms

application letter Message that accompanies a résumé to let readers know what you're sending, why you're sending it, and how they can benefit from reading it

behavioral interview questions Questions in which you are asked to relate specific incidents and experiences from your past

case interview Interview that presents candidates with one or more problems or questions to solve

employment interview Formal meeting during which you and an employer ask questions and exchange information

group interview Interview in which one or more interviewers meet with several candidates simultaneously

panel interview Interview in which you meet with several interviewers at once

situational interview questions Similar to behavioral interview questions, except they focus on how you would handle various hypothetical situations on the job

stress interview Interview in which you might be asked questions designed to unsettle you or subject you to long periods of silence, criticism, interruptions, or hostile reactions by the interviewer

structured interview Interview in which the interviewer (or a computer) asks a series of prepared questions in a set order

unstructured interview Interview that doesn't follow a predetermined sequence; it is likely to feel more conversational and personal, as the interviewer adapts the line of questioning based on the candidate's answers

Summary Of Learning Objectives

1 Explain the purposes of application letters, and describe how to apply the AIDA organizational approach to them. The purposes of an application letter are to introduce your résumé, persuade an employer to read it, and request an interview. With the AIDA model, get attention in the opening paragraph by showing how your work skills could benefit the organization, by explaining how your qualifications fit the job, or by demonstrating an understanding of the organization's needs. Build interest and desire by showing how you can meet the job requirements and, near the end of this section, be sure to refer your reader to your résumé. Finally, motivate action by making your request easy to fulfill and by including all necessary contact information.

2 Describe the typical sequence of job interviews, the major types of interviews and interview questions, and the attributes employers look for during an interview. The typical sequence of interviews involves a *screening stage*, during which employers filter out unqualified applicants and identify promising candidates, and a *selection stage*, in which the pool of applicants is narrowed through a variety of structured and unstructured interviewing methods and employers select the candidates who will receive offers.

Interviews can be distinguished by the way they are structured (structured or unstructured interviews) and the number of people involved (one-on-one, panel, or group interviews). Four common types of interview questions are *behavioral* (which require candidates to use their own experiences and attributes to craft answers), *situational* (explore how the candidate would respond to hypothetical situations), *case interviews and take-home assignments* (ask candidates to perform an analysis or other task), and *stress* (designed to see how well candidates perform under stress).

Employers try to answer two major questions during an employment interview: whether an applicant is qualified and whether the applicant will be a good fit with the "personality" of the organization and the position.

3 List six tasks you need to complete to prepare for a successful job interview. To prepare for a successful job interview, (1) complete your research about the organization and the position, (2) think ahead about questions you'll need to answer and questions you'll want to ask, (3) boost your confidence by focusing on your strengths and preparing thoroughly, (4) polish your interviewing style, (5) present a professional image with appropriate clothing and good grooming, and (6) arrive on time and ready to begin.

4 Explain how to succeed in all three stages of an interview. All employment interviews have three loosely defined stages. The warm-up stage is the most important because first impressions greatly influence an interviewer's decision. Pay close attention to your body language and etiquette with everyone you encounter, and be ready to answer common openers such as "Tell me about yourself." The question-and-answer stage, during which you will answer and ask questions, is the longest. Be prepared to answer the most common interview questions, and find ways to work in questions of your own that you have prepared. Listen carefully to every question, view each question as an opportunity to expand on the information presented in your résumé, and be prepared to handle difficult or potentially discriminatory questions. The close is your final opportunity to promote your value to the organization and counter any misconceptions the interviewer may have. End with a warm smile and a firm handshake to leave the interviewer with a positive impression.

5 Identify the most common employment messages that follow an interview, and explain when you would use each one. Following an interview, send a *follow-up* message to show appreciation, emphasize your strengths, and politely ask for a decision. Send an *inquiry* if you haven't received the interviewer's decision by the date promised or within one or two weeks of the interview—especially if you've received a job offer from another firm. You can send a *request for a time extension* if you need more time to consider an offer. Send a *letter of acceptance* after receiving a job offer you want to take. Send a *letter declining a job offer* when you want to refuse an offer tactfully. Finally, if you are currently employed, send a *letter of resignation* after you have accepted the offer of another job.

Test Your Knowledge

To review chapter content related to each question, refer to the indicated Learning Objective.

19-1. What is *prospecting*, and how does it differ from applying for posted job openings? [LO-1]

19-2. How can you apply the AIDA model to an application letter? [LO-1]

19-3. What information or questions can you use when writing a follow-up message after submitting a résumé? [LO-1]

19-4. What is the STAR approach to answering behavioral interview questions? [LO-2]
19-5. What are the four goals you should try to accomplish during the selection stage? [LO-2]
19-6. Why do many employers now use situational or behavioral interview questions? [LO-2]
19-7. How does a structured interview differ from an unstructured interview? [LO-2]
19-8. Why are the questions you ask during an interview as important as the answers you give to the interviewer's questions? [LO-3]
19-9. What are the three stages of every interview, and which is the most important? [LO-4]
19-10. How should you respond if an interviewer at a company where you want to work asks you a question that seems too personal or unethical? [LO-4]

Apply Your Knowledge

To review chapter content related to each question, refer to the indicated Learning Objective.

19-11. How can you distinguish yourself from other candidates in a screening interview and still keep your responses short and to the point? Explain. [LO-2]
19-12. How could you use the group interview format to distinguish yourself as a team player? [LO-2]
19-13. If you lack one important qualification for a job but have made it past the screening stage, how should you prepare to handle this issue during the next round of interviews? [LO-3]
19-14. What is an interviewer likely to conclude about you if you don't have any questions to ask during the interview? [LO-3]
19-15. Why is it important to distinguish unethical or illegal interview questions from acceptable questions? [LO-4]

Practice Your Skills

Messages for Analysis

Read the following messages and then (1) analyze the strengths or weaknesses of each document and (2) revise each document so that it follows this chapter's guidelines.

19-16. **Writing an Application Letter [LO-1]**

I'm writing to let you know about my availability for the brand manager job you advertised. As you can see from my enclosed résumé, my background is perfect for the position. Even though I don't have any real job experience, my grades have been outstanding considering that I went to a top-ranked business school.

I did many things during my undergraduate years to prepare me for this job:

- Earned a 3.4 out of a 4.0 with a 3.8 in my business courses
- Elected representative to the student governing association
- Selected to receive the Lamar Franklin Award
- Worked to earn a portion of my tuition

I am sending my résumé to all the top firms, but I like yours better than any of the rest. Your reputation is tops in the industry, and I want to be associated with a business that can pridefully say it's the best.

If you wish for me to come in for an interview, I can come on a Friday afternoon or anytime on weekends when I don't have classes. Again, thanks for considering me for your brand manager position.

19-17. **Writing an Application Follow-Up Message [LO-1]**

Did you receive my résumé? I sent it to you at least two months ago and haven't heard anything. I know you keep résumés on file, but I just want to be sure that you keep me in mind. I heard you are hiring health-care managers and certainly would like to be considered for one of those positions.

Since I last wrote you, I've worked in a variety of positions that have helped prepare me for management. To wit, I've become lunch manager at the restaurant where I work, which involved a raise in pay. I now manage a waitstaff of 12 and take the lunch receipts to the bank every day.

Of course, I'd much rather be working at a real job, and that's why I'm writing again. Is there anything else you would like to know about me or my background? I would really like to know more about your company. Is there any literature you could send me? If so, I would really appreciate it.

I think one reason I haven't been hired yet is that I don't want to leave Atlanta. So I hope when you think of me, it's for a position that wouldn't require moving. Thanks again for considering my application.

19-18. **Writing a Follow-Up Message [LO-5]**

Thank you for the really marvelous opportunity to meet you and your colleagues at Starret Engine Company. I really enjoyed touring your facilities and talking with all the people there. You have quite a crew! Some of the other companies I have visited have been so rigid and uptight that I can't imagine how I would fit in. It's a relief to run into a group of people who seem to enjoy their work as much as all of you do.

I know that you must be looking at many other candidates for this job, and I know that some of them will probably be more experienced than I am. But I do want to emphasize that my two-year hitch in the Navy involved a good deal of engineering work. I don't think I mentioned all my shipboard responsibilities during the interview.

Please give me a call within the next week to let me know your decision. You can usually find me at my dormitory in the evening after dinner (phone: 877-9080).

19-19. **Writing a Message of Inquiry [LO-5]**

I have recently received a very attractive job offer from the Warrington Company. But before I let them know one way or another, I would like to consider any offer that your firm may extend. I was quite impressed with

your company during my recent interview, and I am still very interested in a career there.

I don't mean to pressure you, but Warrington has asked for my decision within 10 days. Could you let me know by Tuesday whether you plan to offer me a position? That would give me enough time to compare the two offers.

19-20. **Writing a Message to Decline a Job Offer** [LO-5]
I'm writing to say that I must decline your job offer. Another company has made me a more generous offer, and I have decided to accept. However, if things don't work out for me there, I will let you know. I sincerely appreciate your interest in me.

Exercises

Each activity is labeled according to the primary skill or skills you will need to use. To review relevant chapter content, refer to the indicated Learning Objective. In some instances, supporting information will be found in another chapter, as indicated.

19-21. **Career Management: Preparing for Interviews** [LO-3] Google yourself, scour your social networking profiles, review your Twitter messages, and explore every other possible online source you can think of that might have something about you. If you find anything potentially embarrassing, remove it if possible. Write a summary of your search-and-destroy mission. (Don't share any details you would prefer to keep private.)

19-22. **Career Management: Researching Target Employers** [LO-3] Select a company where you might like to work. Gather some preliminary research on the company as though you were preparing for an interview. Don't limit your search to the company's own website.

- What did you learn about this organization that would help you during an interview there?
- What sources did you use to obtain this information?
- Armed with this information, what aspects of your background do you think might appeal to this company's recruiters?
- If you choose to apply for a job with this company, what keywords would you include on your résumé? Why?

19-23. **Career Management: Interviewing** [LO-3] Prepare written answers to 10 of the questions listed in Table 19.4 on page 567.

19-24. **Career Management: Interviewing** [LO-4] Write a short email to your instructor discussing what you believe are your greatest strengths and weaknesses from an employment perspective. Next, explain how these strengths and weaknesses might be viewed by interviewers evaluating your qualifications.

19-25. **Career Management: Interviewing; Collaboration: Team Projects** [LO-4], **Chapter 2** In this exercise, half the class will be recruiters for a large department store chain that is looking to fill 15 manager-trainee positions. The other half will be candidates for the job. The company is specifically looking for candidates who demonstrate these three qualities: initiative, dependability, and willingness to assume responsibility.

- Have each recruiter select and interview an applicant for 10 minutes.
- Have all the recruiters discuss how they assessed the applicant in each of the three desired qualities. What questions did they ask, or what did they use as an indicator to determine whether the candidate possessed the quality?
- Have all the applicants discuss what they said to convince the recruiters that they possessed each of the three desired qualities.

19-26. **Message Strategies: Employment Messages, Communication Ethics: Resolving Ethical Dilemmas** [LO-5], **Chapter 1** You have decided to accept a new position with a competitor of your company. Write a letter of resignation to your supervisor, announcing your decision. (Make up any information you need.) In an email message to your instructor, address the following questions:

- Will you notify your employer that you are joining a competing firm? Explain.
- Will you use the direct or indirect approach? Explain.
- Will you send your letter by email, place it on your supervisor's desk, or hand it to your supervisor personally?

Expand Your Skills

Critique the Professionals

Find an online video of a business professional being interviewed by a journalist. Using whatever medium your instructor requests, write a brief (no more than one page) assessment of the professional's performance and any tips you picked up that you could use in job interviews.

Sharpen Your Career Skills Online

Find a website, video, article, podcast, or presentation that offers advice on successful interviewing techniques. Write a brief email message to your instructor or a post for your class blog describing the item that you found and summarizing the career skills information you learned from it.

Build Your Career

If you've followed the Build Your Career exercises through the previous 18 chapters, you should have a solid foundation in place for your résumé. Now it's time for the other essential piece of your employment package, your application letter (or email message, as it often is). Start by reviewing the information about crafting an application letter on pages 552–557. While you're working on your letter, keep these four points in mind:[47]

- **Use the direct approach.** Let the recipient know in the first or second sentence why you are writing by referring to a specific job opening (for solicited letters) or

expressing your interest in particular types of openings (for unsolicited letters).

- **Complement your résumé, not repeat it.** The application letter is an opportunity to use a more conversational style and explain or expand on key points from your résumé.
- **Remember that it's a promotional message.** Don't be shy about explaining why you are a good fit for the company and the position.
- **End on a positive, grateful tone.** Be sure to include your phone number and email address so it's easy for employers to reach out to you.

Cases

For all cases, feel free to use your creativity to make up any details you need to craft effective messages.

Application Letters

CAREER SKILLS/VIDEO SKILLS

19-27. Media Skills: Video; Message Strategies: Employment Messages [LO-1] With its encouragement of video applications and abandonment of traditional job postings, Zappos might be starting a mini-trend toward a new style of employment application.

Your task: Identify a company where you would like to work and assume that it encourages candidates to submit video introductions. Plan, record, and produce a short video (no longer than three minutes) that you might submit to this employer. Don't worry too much about fancy production quality, but make sure your content and presentation match the company's style and brand image.

CAREER SKILLS/EMAIL SKILLS

19-28. Message Strategies: Employment Messages [LO-1] Use one of the websites listed in Table 18.2 on page 521 to find a job opening in your target profession. If you haven't narrowed down to one career field yet, choose a business job for which you will have at least some qualifications at the time of your graduation.

Your task: Write an email message that would serve as your application letter if you were to apply for this job. Base your message on your actual qualifications for the position, and be sure to "echo" the requirements listed in the job description. Include the job description in your email message when you submit it to your instructor.

CAREER SKILLS/MICROBLOGGING SKILLS

19-29. Message Strategies: Employment Messages [LO-1] If you want to know whether job candidates can express themselves clearly on Twitter, why not test them as part of the application process? That's exactly what the Minneapolis advertising agency Campbell Mithun did. Rather than having intern candidates use conventional application methods, the company asked them to tweet their applications in 13 messages.[48]

Your task: Find a job opening on Twitter by searching on any of the following hashtags: #hiring, #joblisting, or #nowhiring.[49] Next, write an "application letter" comprising 13 individual tweets. If your class is set up with private Twitter accounts, go ahead and send the tweets. Otherwise, email them to your instructor or post them on your class blog, as your instructor indicates.

Interviewing

CAREER SKILLS/BLOGGING SKILLS/TEAM SKILLS

19-30. Career Management: Researching Target Employers [LO-3] Research is a critical element of the job-search process. With information in hand, you increase the chance of finding the right opportunity (and avoiding bad choices), and you impress interviewers in multiple ways by demonstrating initiative, curiosity, research and analysis skills, an appreciation for the complex challenges of running a business, and willingness to work to achieve results.

Your task: With a small team of classmates, use online job listings to identify an intriguing job opening that at least one member of the team would seriously consider pursuing as graduation approaches. (You'll find it helpful if the career is related to at least one team member's college major or on-the-job experience so that the team can benefit from some knowledge of the profession in question.) Next, research the company, its competitors, its markets, and this specific position to identify five questions that would (1) help the team member decide whether this is a good opportunity and (2) show an interviewer that you've really done your homework. Go beyond the basic and obvious questions to identify current, specific, and complex issues that only deep research can uncover. For example, is the company facing significant technical, financial, legal, or regulatory challenges that threaten its ability to grow or perhaps even survive in the long term? Or is the market evolving in a way that positions this particular company for dramatic growth? In a post for your class blog, list your five questions, identify how you uncovered the issue, and explain why each is significant.

CAREER SKILLS/TEAM SKILLS

19-31. Career Management: Interviewing [LO-4] Interviewing is a skill that can be improved through observation and practice.

Your task: You and all other members of your class are to write letters of application for a management-trainee position at Enterprise Holdings (careers.enterprise.com). Sign your letter with a fictitious name that conceals your identity. Next, polish (or create) a résumé that accurately identifies you and your educational and professional accomplishments.

Now, three members of the class who volunteer as interviewers divide up all the anonymously written application letters. Then each interviewer selects a candidate who seems the most convincing in his or her letter. At this time, the selected candidates identify themselves and give the interviewers their résumés.

Each interviewer then interviews his or her chosen candidate in front of the class, seeking to understand how the items on the résumé qualify the candidate for the job. At the end of the interviews, the class decides who gets the job and discusses why this candidate was successful. Afterward, retrieve your letter, sign it with the right name, and submit it to the instructor for credit.

CAREER SKILLS/TEAM SKILLS

19-32. Career Management: Interviewing [LO-4] Preparing answers to the most-common "stock" interviewing questions is an important step.

Your task: Working with a classmate, take turns asking each other the six questions listed on pages 566–567. With each question, the interviewer should evaluate the respondent's ability to provide a concise and coherent answer. Share your notes after the simulation, and give each other tips on where to improve.

CAREER SKILLS/TEAM SKILLS

19-33. Career Management: Interviewing [LO-4] Select one of the following companies, and then identify an interesting position within the company: Accenture, KPMG, Novo Nordisk, Texas Health Resources, REI, Wegmans Food Markets, or Workday. Study the company and prepare for an interview with that company.

Your task: Working with a classmate, take turns interviewing each other for your chosen positions. Interviewers should take notes during the interview. When the interview is complete, critique each other's performance. (Interviewers should critique how well candidates prepared for the interview and answered the questions; interviewees should critique the quality of the questions asked.) Write a follow-up letter thanking your interviewer, and submit the letter to your instructor.

Following Up After An Interview

CAREER SKILLS/LETTER-WRITING SKILLS

19-34. Message Strategies: Employment Messages [LO-5] Because of a mix-up in your job application scheduling, you accidentally applied for your third-choice job before going after the one you really wanted. What you want to do is work in retail marketing with the upscale department store Neiman Marcus in Dallas; what you have been offered is a job with Longhorn Leather and Lumber, 65 miles away in the small town of Commerce, Texas.

You review your notes. Your Longhorn interview was three weeks ago with the human resources manager, R. P. Bronson, who has just written to offer you the position. The store's address is 27 Sam Rayburn Drive, Commerce, TX 75428. Mr. Bronson notes that he can hold the position open for 10 days. You have an interview scheduled with Neiman Marcus next week, but it is unlikely that you will know the store's decision within this 10-day period.

Your task: Write to Mr. Bronson requesting a reasonable delay in your consideration of his job offer.

CAREER SKILLS/LETTER-WRITING SKILLS/ EMAIL SKILLS

19-35. Message Strategies: Employment Messages [LO-5] Fortunately for you, your interview with Neiman Marcus (see the previous case) went well, and you've just received a job offer from the company.

Your task: Write a letter to R. P. Bronson at Longhorn Leather and Lumber declining his job offer, and write an email message to Clarissa Bartle at Neiman Marcus, accepting her job offer. Make up any information you need when accepting the Neiman Marcus offer.

CAREER SKILLS/LETTER-WRITING SKILLS

19-36. Message Strategies: Employment Messages (Letters of Resignation) [LO-5] Leaving a job is rarely stress free, but it's particularly difficult when you are parting ways with a mentor who played an important role in advancing your career. A half-dozen years into your career, you have benefited greatly from the advice, encouragement, and professional connections offered by your mentor, who also happens to be your current boss. She seemed to believe in your potential from the beginning and went out of her way on numerous occasions to help you. You returned the favor by becoming a stellar employee who has made important contributions to the success of the department your boss leads.

Unfortunately, you find yourself at a career impasse. You believe you are ready to move into a management position, but your company is not growing enough to create many opportunities. Worse yet, you joined the firm during a period of rapid expansion, so there are many eager and qualified internal candidates at your career level interested in the few managerial jobs that do become available. You fear it may be years before you get the chance to move up in the company. Through your online networking activities, you found an opportunity with a firm in another industry and have decided to pursue it.

Your task: You have a close relationship with your boss, so you will announce your intention to leave the company in a private, one-on-one conversation. However, you also recognize the need to write a formal letter of resignation, which you will hand to your boss during this meeting. This letter is addressed to your boss, but as formal business correspondence that will become part of your personnel file, it should not be a "personal" letter. Making up whatever details you need, write a brief letter of resignation.

Five-Minute Guide to Preparing for Job Interviews

As you begin to prepare for interviews, take five minutes to review these important tips.

00:01

Learn about the organization

1. Interviewers expect you to be familiar with their companies and industries.
2. Research online to get basic information about the firm, its product lines, and its competition.
3. Try to get the names of your interviewers (it's acceptable to ask your company contact) and learn about them on LinkedIn or other social media.

00:02

Plan for the employer's questions

1. Be ready for "stock" interview questions, including these (see Table 19.4 or research online for more):
   - What is the hardest decision you've ever had to make?
   - What is your greatest weakness?
   - Where do you want to be five years from now?
   - What didn't you like about previous jobs you've held?
   - How do you spend your free time?
2. Be ready for specific questions that will explore your readiness for the position.

00:03

Plan questions of your own

1. You need to prepare questions, for two important reasons:
   - This is your chance to make sure the job and the company are right for you.
   - Interviewers want to know that you are curious and serious; not having any questions can raise a red flag for interviewers.
2. Consider asking these questions, if relevant:
   - How does this job fit in the overall department or organization?
   - What have past employees done to excel in this position?
   - How do you measure success for someone in this position?
   - What is the first problem that needs the attention of the person you hire?
   - How well do my qualifications align with the current and future needs of this position?
   - Why is this job now vacant?
   - What makes your organization different from others in the industry?
   - How would you define your organization's managerial philosophy?
   - What is a typical workday like for you?
   - What are the next steps in the selection process? What's the best way to follow up with you?

00:04

Boost your confidence and polish your style

1. Remember that you are discussing a mutually beneficial business arrangement: You have value to offer the employer, and the employer already thinks highly enough of you to invite you to an interview.
2. Plan to offset any weaknesses you may have with positive attributes of your skill set, experience, personality, and character.
3. Conduct and record mock interviews so you can evaluate and improve your interviewing style.
4. Review the list of warning signs in Table 19.6, and make sure you don't exhibit any of these.

00:05

Present a professional image

1. Research the company and the industry to get a sense of what to wear to the interview.
2. As a general rule, plan to dress slightly more formally than the style most employees appear to adopt; you want to show respect for the situation while recognizing the prevailing culture at the company.

Endnotes

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A Format and Layout of Business Documents

The format and layout of business documents vary from country to country. In addition, many organizations develop their own variations of standard styles, adapting documents to the types of messages they send and the kinds of audiences they communicate with. The formats described here are the most common approaches used in U.S. business correspondence, but be sure to follow whatever practices are expected at your company.

First Impressions

Your documents tell readers a lot about you and about your company's professionalism, so all your documents must look neat, present a professional image, and be easy to read. Your audience's first impression of a document comes from the quality of its paper, the way it is customized, and its general appearance.

PAPER

To give a quality impression, businesspeople consider carefully the paper they use. Several aspects of paper contribute to the overall impression:

- **Weight.** Paper quality is judged by the weight of four reams (each a 500-sheet package) of letter-size paper. The weight most commonly used by U.S. business organizations is 20-pound paper, but 16- and 24-pound versions are also used.
- **Cotton content.** Paper quality is also judged by the percentage of cotton in the paper. Cotton doesn't yellow over time the way wood pulp does, plus it's both strong and soft. When you want to make a formal impression, you can use paper with 25 percent or even 100 percent cotton content.[1]
- **Size.** In the United States, the standard paper size for business documents is 8½ by 11 inches. Standard legal documents are 8½ by 14 inches.
- **Color.** White is the standard color for business purposes, although neutral colors such as gray and ivory are sometimes used. Memos can be produced on pastel-colored paper to distinguish them from external correspondence. In addition, memos are sometimes produced on paper of various colors for routing to separate departments. Light-colored papers are appropriate, but bright or dark colors make reading difficult and may seem too frivolous.

CUSTOMIZATION

For letters to outsiders, U.S. businesses commonly use letterhead stationery, which may be either professionally printed or designed in-house using word-processing templates and graphics. Letterhead typically contains the company name, logo, address, telephone and fax numbers, general email address, website URL, and possibly one or more social media URLs.

In the United States, businesses always use letterhead for the first page of a letter. Successive pages are usually plain sheets of paper that match the letterhead in color and quality. Some companies use a specially printed second-page letterhead that bears only the company's name.

APPEARANCE

Make sure your documents present your ideas in a positive light. Pay close attention to all the factors that affect appearance, including the following:

- **Margins.** Business letters typically use 1-inch margins at the top, bottom, and sides of the page, although these parameters are sometimes adjusted to accommodate letterhead elements.
- **Justification.** For all routine business documents, all lines (body text and headings) should be left-justified.
- **Character spacing.** Use proper spacing between characters and after punctuation. For example, U.S. conventions include leaving one space after commas, semicolons, colons, and sentence-ending periods. Each letter in a person's initials is followed by a period and a single space. However, abbreviations such as U.S.A. or MBA may or may not have periods, but they never have internal spaces.
- **Special symbols.** Take advantage of the many special symbols available with your computer's selection of fonts. In addition, see whether your company has a style guide for documents, which may include particular symbols you are expected to use.

- **Corrections.** Messy corrections are unacceptable in business documents. If you notice an error after printing a document with your word processor, correct the mistake and reprint. (With informal memos to members of your own team or department, the occasional small correction in pen or pencil is acceptable, but never in formal documents.)

Letters

All business letters have certain elements in common. Several of these elements appear in every letter; others appear only when desirable or appropriate. In addition, these letter parts are usually arranged in one of three basic formats.

STANDARD LETTER PARTS

The letter in Figure A.1 shows the placement of standard letter parts. The writer of this business letter had no letterhead available but correctly included a heading. All business letters typically include these seven elements.

Heading

The elements of the letterhead make up the heading of a letter in most cases. If letterhead stationery is not available, the heading includes a return address (but no name) and starts 13 lines from the top of the page, which leaves a 2-inch top margin.

Date

If you're using letterhead, place the date at least one blank line beneath the lowest part of the letterhead. Without letterhead, place the date immediately below the return address. The standard method of writing the date in the United States uses the full name of the month (no abbreviations), followed by the day (in numerals, without *st*, *nd*, *rd*, or *th*), a comma, and then the year: July 31, 2021 (7/31/2021). Table A.1 shows date formats commonly used in other countries.

Inside Address

The inside address identifies the recipient of the letter. For U.S. correspondence, begin the inside address at least one line below the date. Precede the addressee's name with a

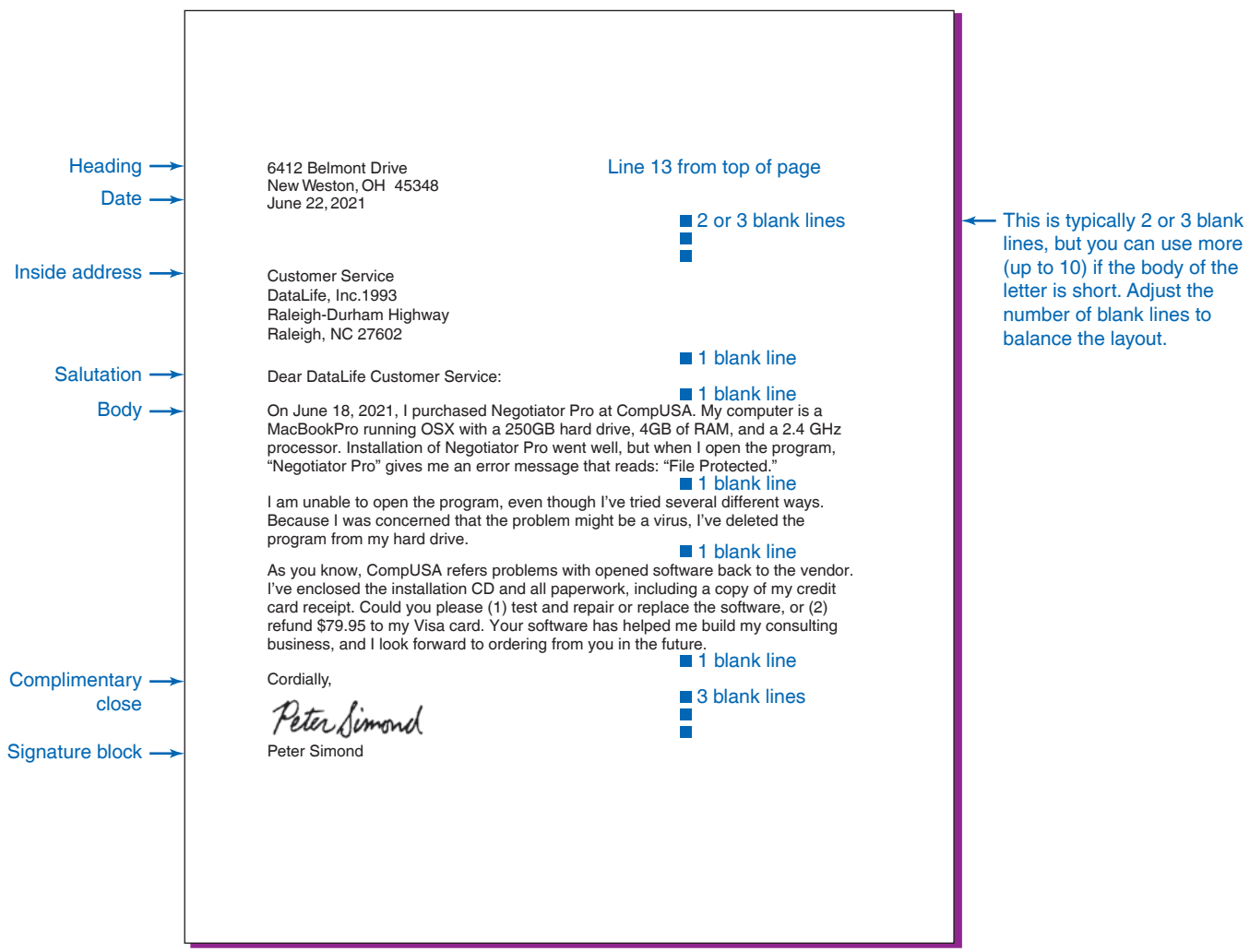


Figure A.1 **Standard Letter Parts**

TABLE A.1 Common Date Forms

Convention	Order	Examples
U.S. standard	Month day year	July 31, 2021 7/31/2021 7-31-2021
Japan	Year month day	2021/07/31
Europe (most countries)	Day month year	31 July 2021 31/07/21 31.07.21
International (ISO) format	Year month day	2021-07-31

courtesy title, such as *Dr.*, *Mr.*, or *Ms.* The accepted courtesy title for women in business is *Ms.*, although a woman known to prefer the title *Miss* or *Mrs.* is always accommodated. If you don't know whether a person is a man or a woman (and you have no way of finding out), omit the courtesy title. For example, *Terry Smith* could be either a man or a woman. The first line of the inside address would be just *Terry Smith*, and the salutation would be *Dear Terry Smith*. The same is true if you know only a person's initials, as in *S. J. Adams*.

Spell out and capitalize titles that precede a person's name, such as *Professor* or *General* (see Table A.2 on the next page for the proper forms of address). The person's organizational title, such as *Director*, may be included on this first line (if it is short) or on the line below; the name of a department may follow. In addresses and signature lines, don't forget to capitalize any professional title that follows a person's name:

Mr. Ray Johnson, Dean

Ms. Patricia T. Higgins
Assistant Vice President

However, professional titles not appearing in an address or signature line are capitalized only when they directly precede the name:

President Kenneth Johanson will deliver the speech.

Maria Morales, president of ABC Enterprises, will deliver the speech.

The Honorable Helen Masters, senator from Arizona, will deliver the speech.

If the name of a specific person is unavailable, you may address the letter to the department or to a specific position within the department. Also, be sure to spell out company names in full, unless the company itself uses abbreviations in its official name.

Other address information includes the treatment of buildings, house numbers, and compass directions (see Table A.3 on the next page). The following example shows all the information that may be included in the inside address and its proper order for U.S. correspondence:

Ms. Linda Coolidge, Vice President
Corporate Planning Department
Midwest Airlines
Kowalski Building, Suite 21-A
7279 Bristol Ave.
Toledo, OH 43617

Canadian addresses are similar, except that the name of the province is usually spelled out:

Dr. H. C. Armstrong
Research and Development
Commonwealth Mining Consortium
The Chelton Building, Suite 301
585 Second St. SW
Calgary, Alberta T2P 2P5

The order and layout of address information vary from country to country. So when addressing correspondence for other countries, carefully follow the format and information that appear in the company's letterhead. However, when you're sending mail from the United States, be sure that the name of the destination country appears on the last line of the address in capital letters. Use the English version of the country name so that your mail is routed from the United States to the right country. Then, to be sure your mail is routed correctly within the destination country, use the foreign spelling of the city name (using the characters and diacritical marks that would be commonly used in the region). For example, the following address uses *Köln* instead of *Cologne*:

R. Veith, Director	Addressee
Eisfieren Glaswerk	Company name
Blaubachstrasse 13	Street address
Postfach 10 80 07	Post office road
D-5000 Köln I	District, city
GERMANY	Country

TABLE A.2 Forms of Address

Person	In Address	In Salutation
Personal Titles		
Man	Mr. [first & last name]	Dear Mr. [last name]:
Woman*	Ms. [first & last name]	Dear Ms. [last name]:
Two men (or more)	Mr. [first & last name] and Mr. [first & last name]	Dear Mr. [last name] and Mr. [last name] *or* Messrs. [last name] and [last name]:
Two women (or more)	Ms. [first & last name] and Ms. [first & last name]	Dear Ms. [last name] and Ms. [last name] *or* Mses. [last name] and [last name]:
One woman and one man	Ms. [first & last name] and Mr. [first & last name]	Dear Ms. [last name] and Mr. [last name]:
Couple (married with same last name)	Mr. [husband's first name] and Mrs. [wife's first name] [couple's last name]	Dear Mr. and Mrs. [last name]:
Couple (married with different last names)	Mr. [first & last name of husband] and Ms. [first & last name of wife]	Dear Mr. [husband's last name] and Ms. [wife's last name]:
Couple (married professionals with same title and same last name)	[title in plural form] [husband's first name] and [wife's first name] [couple's last name]	Dear [title in plural form] [last name]:
Couple (married professionals with different titles and same last name)	[title] [first & last name of husband] and [title] [first & last name of wife]	Dear [title] and [title] [last name]:
Professional Titles		
President of a college or university	[title] [first & last name], President	Dear President [last name]:
Dean of a school or college	Dean [first & last name] *or* Dr., Mr., *or* Ms. [first & last name], Dean of [title]	Dear Dean [last name]: *or* Dear Dr., Mr., *or* Ms. [last name]:
Professor	Professor *or* Dr. [first & last name]	Dear Professor *or* Dr. [last name]:
Physician	[first & last name], M.D.	Dear Dr. [last name]:
Lawyer	Mr. *or* Ms. [first & last name], Attorney at Law	Dear Mr. *or* Ms. [last name]:
Military personnel	[full rank, first & last name, abbreviation of service designation] (add *Retired* if applicable)	Dear [rank] [last name]:
Company or corporation	[name of organization]	Ladies and Gentlemen: *or* Gentlemen and Ladies:
Governmental Titles		
President of the United States	The President	Dear Mr. *or* Madam President:
Senator of the United States	The Honorable [first & last name]	Dear Senator [last name]:
Cabinet member	The Honorable [first & last name]	Dear Mr. *or* Madam Secretary:
Attorney General	The Honorable [first & last name]	Dear Mr. *or* Madam Attorney General:
Mayor	The Honorable [first & last name], Mayor of [name of city]	Dear Mayor [last name]:
Judge	The Honorable [first & last name]	Dear Judge [last name]:

*Use *Mrs.* or *Miss* only if the recipient has specifically requested that you use one of these titles; otherwise *always* use *Ms.* in business correspondence. Also, never refer to a married woman by her husband's name (for example, Mrs. Robert Washington) unless she specifically requests that you do so.

TABLE A.3 Inside Address Information

Description	Example
Capitalize building names.	Empire State Building
Capitalize locations within buildings (apartments, suites, rooms).	Suite 1073
Use numerals for all house or building numbers, except the number one.	One Trinity Lane; 637 Adams Ave., Apt. 7
Spell out compass directions that fall within a street address.	1074 West Connover St.
Abbreviate compass directions that follow the street address.	783 Main St., N.E., Apt. 27

Salutation

In the salutation of your letter, follow the style of the first line of the inside address. If the first line is a person's name, the salutation is *Dear Mr.* or *Ms. Name*. The formality of the salutation depends on your relationship with the addressee. If in conversation you would say "Mary," your letter's salutation should be *Dear Mary*, followed by a colon. Otherwise, include the courtesy title and last name, followed by a colon. Presuming to write *Dear Lewis* instead of *Dear Professor Chang* demonstrates a disrespectful familiarity that the recipient will probably resent.

If the first line of the inside address is a position title such as *Director of Personnel*, then use *Dear Director*. If the addressee is unknown, use a polite description, such as *Dear Alumnus*, *Dear SPCA Supporter*, or *Dear Voter*. If the first line is plural (a department or company), then use *Ladies and Gentlemen* (look again at Table A.2). When you do not know whether you're writing to an individual or a group (for example, when writing a reference or a letter of recommendation), use *To whom it may concern*.

Whether your salutation is informal or formal, be especially careful that names are spelled correctly. A misspelled name is glaring evidence of carelessness, and it belies the personal interest you're trying to express.

Body

The body of the letter is your message. Almost all letters are single-spaced, with one blank line before and after the salutation, between paragraphs, and before the complimentary close. The body may include indented lists, entire paragraphs indented for emphasis, and even subheadings. If it does, all similar elements should be treated in the same way. Your department or company may select a format to use for all letters.

Complimentary Close

The complimentary close begins on the second line below the body of the letter. Alternatives for wording are available, but the current trend seems to be toward one-word closes, such as *Sincerely* and *Cordially*. In any case, the complimentary close reflects the relationship between you and the person you're writing to. Avoid cute closes, such as *Yours for bigger profits*. If your audience doesn't know you well, your sense of humor may be misunderstood.

Signature Block

Leave three blank lines for a written signature below the complimentary close, and then include the sender's name (unless it appears in the letterhead). The person's title may appear on the same line as the name or on the line below:

Cordially,

Raymond Dunnigan
Director of Personnel

Your letterhead indicates that you're representing your company. However, if your letter is on plain paper or runs to a second page, you may want to emphasize that you're speaking legally for the company. The accepted way of doing that is to place the company's name in capital letters, a double space below the complimentary close, and then include the sender's name and title four lines below that:

Sincerely,
WENTWORTH INDUSTRIES

Helen B. Taylor
President

If your name could be taken for either a man's or a woman's, a courtesy title indicating gender should be included, with or without parentheses. Also, women who prefer a particular courtesy title should include it:

Mrs. Nancy Winters
(Ms.) Juana Flores
Ms. Pat Li
(Mr.) Jamie Saunders

ADDITIONAL LETTER PARTS

Letters vary greatly in subject matter and thus in the identifying information they need and the format they adopt. The letter in Figure A.2 on the next page shows how these additional parts should be arranged. The following elements may be used in any combination, depending on the requirements of the particular letter:

- **Addressee notation.** Letters that have a restricted readership or that must be handled in a special way should include such addressee notations as *PERSONAL*, *CONFIDENTIAL,* or *PLEASE FORWARD*. This sort of notation appears a double space above the inside address, in all-capital letters.
- **Attention line.** If you are writing to a company and don't know the name of the person you would like to reach, you can use an attention line, such as *Attention: Customer Service*.
- **Subject line.** The subject line tells recipients at a glance what the letter is about (and indicates where to file the letter for future reference). It usually appears below the salutation, either against the left margin, indented (as a paragraph in the body), or centered. It can be placed above the salutation or at the very top of the page, and it can be underscored. Some businesses omit the word *Subject*, and some organizations replace it with *Re:* or *In re:* (meaning "concerning" or "in the matter of"). The subject line may take a variety of forms, including the following:

Subject: RainMaster Sprinklers
Re: About your February 3, 2021, order
In re: Fall 2021 Sales Meeting
Reference Order No. 27920

- **Second-page heading.** Use a second-page heading whenever an additional page is required. Some companies have second-page letterhead (with the company name and address on one line and in a smaller

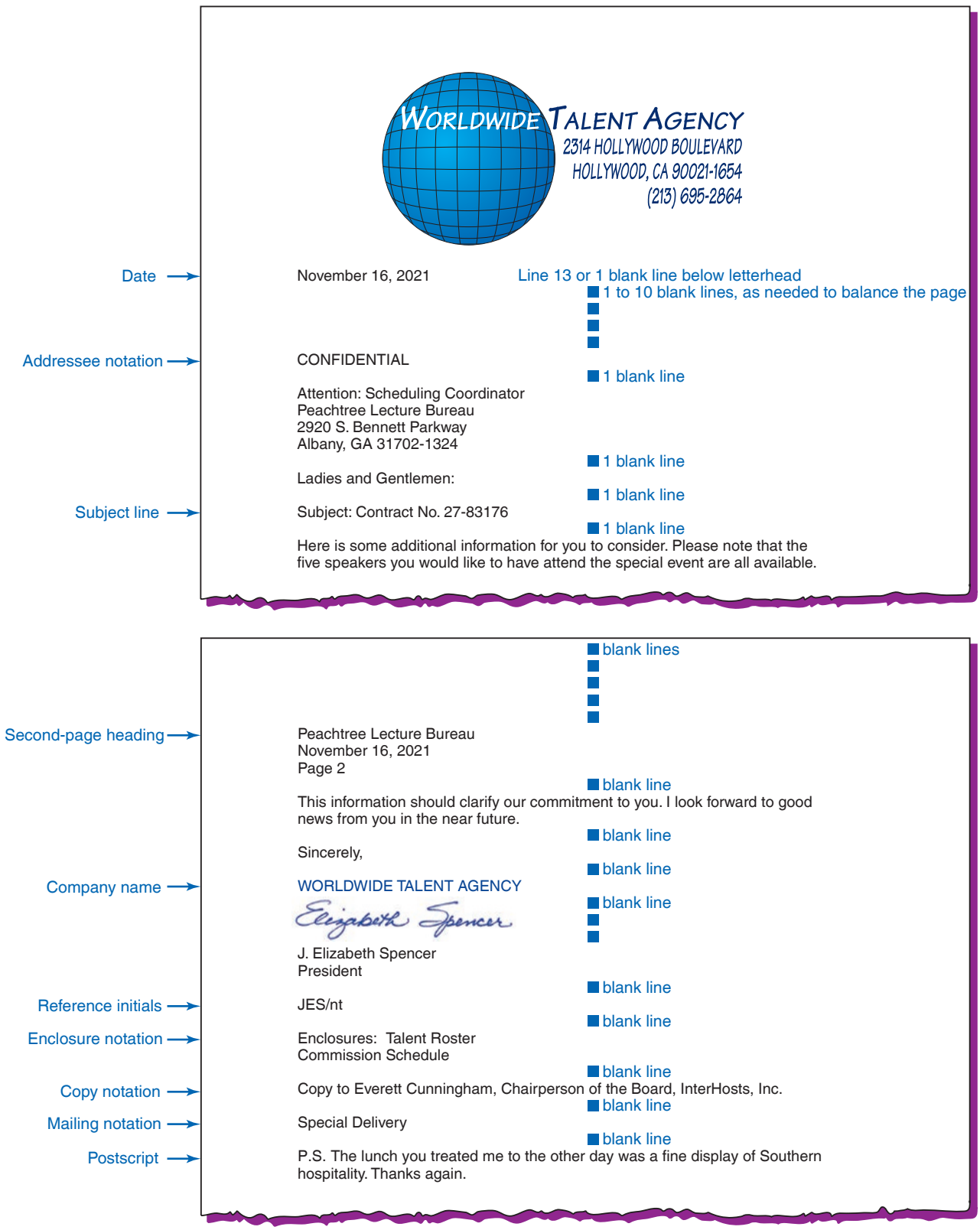


Figure A.2 Additional Letter Parts

typeface). The heading bears the name (person or organization) from the first line of the inside address, the page number, the date, and perhaps a reference number. Leave two blank lines before the body. Make sure that at least two lines of a continued paragraph appear on the first and second pages. Never allow the closing lines to appear alone on a continued page. Precede the complimentary close or signature lines with at least two lines of the body. Also, don't hyphenate the last word on a page. All the following are acceptable forms for second-page headings:

Ms. Melissa Baker
May 11, 2021
Page 2

Ms. Melissa Baker, May 11, 2021, Page 2

Ms. Melissa Baker-2-May 11, 2021

- **Company name.** If you include the company's name in the signature block, put it a double space below the complimentary close. You usually include the company's name in the signature block only when the writer is serving as the company's official spokesperson or when letterhead has not been used.
- **Reference initials.** When one person dictates a letter and another person produces it, optional *reference initials* show who helped prepare it. Place these initials at the left margin, a double space below the signature block, using one of the following forms: *RSR/sm*, *RSR:sm*, or *RSR:SM* (writer/preparer). See "JES/nt" in Figure A.2 for an example. When the signature block includes the writer's name, some companies use only the preparer's initials. When the writer and the signer are different people, you can include both their initials as well as the typist's: *JFS/RSR/sm* (signer/writer/preparer).
- **Enclosure notation.** Enclosure notations appear at the bottom of a letter, one or two lines below the reference initials. Some common forms include the following:

Enclosure
Enclosures (2)
Enclosures: Résumé
Photograph
Brochure

- **Copy notation.** Copy notations may follow reference initials or enclosure notations. They indicate who's receiving a *courtesy copy* (*cc*). Recipients are listed in order of rank or (rank being equal) in alphabetical order. Among the forms used are the following:

cc: David Wentworth, Vice President

Copy to Hans Vogel
748 Chesterton Road
Snohomish, WA 98290

- **Mailing notation.** You may place a mailing notation (such as *Special Delivery* or *Registered Mail*) at the bottom of the letter, after reference initials or enclosure notations (whichever is last) and before copy notations. Or you may place it at the top of the letter, either above the inside address on the left side or just below the date on the right side. For greater visibility, mailing notations may appear in capital letters.
- **Postscript.**A postscript is presented as an afterthought to the letter, a message that requires emphasis, or a personal note. It is usually the last thing on any letter and is usually preceded by *P.S.* A second afterthought would be designated *P.P.S.* (post postscript).

LETTER FORMATS

A letter format is the way of arranging all the basic letter parts. Sometimes a company adopts a certain format as its policy; sometimes the individual letter writer or preparer is allowed to choose the most appropriate format. In the United States, three major letter formats are commonly used:

- **Block format.** Each letter part begins at the left margin. The main advantage is quick and efficient preparation (see Figure A.3 on the next page).
- **Modified block format.** Same as block format, except that the date, complimentary close, and signature block start near the center of the page (see Figure A.4 on page 595). The modified block format does permit indentions as an option. This format mixes preparation speed with traditional placement of some letter parts. It also looks more balanced on the page than the block format does. (Note: The address and contact information in the left margin of this letter is part of this company's particular stationery design; other designs put this information at the top or bottom of the page.)
- **Simplified format.** Instead of using a salutation, this format often weaves the reader's name into the first line or two of the body and often includes a subject line in capital letters (see Figure A.5 on page 596). This format does not include a complimentary close, so your signature appears immediately below the body text. Because certain letter parts are eliminated, some line spacing is changed.

These three formats differ in the way paragraphs are indented, in the way letter parts are placed, and in some punctuation. However, the elements are always separated by at least one blank line, and the printed name is always separated from the line above by at least three blank lines to allow space for a signature. If paragraphs are indented, the indention is normally five spaces. The most common formats for intercultural business letters are the block style and the modified block style.



Figure A.3 **Block Letter Format**

In addition to these three letter formats, letters may also be classified according to their style of punctuation. *Standard*, or *mixed*, *punctuation* uses a colon after the salutation (a comma if the letter is social or personal) and a comma after the complimentary close. *Open punctuation* uses no colon or comma after the salutation or the complimentary close. Although the most popular style in business communication is mixed punctuation, either style of punctuation may be used with block or modified block letter formats. Because the simplified letter format has no salutation or complimentary close, the style of punctuation is irrelevant.

Envelopes

For a first impression, the quality of the envelope is just as important as the quality of the stationery. Letterhead and envelopes should be of the same paper stock, have the same color ink, and be imprinted with the same address and logo. Most envelopes used by U.S. businesses are No. 10 envelopes 9½, which are sized for an 8½-by-11-inch piece of paper folded in thirds. Some occasions call for a smaller No. 6¾, envelope or for envelopes proportioned to fit special stationery. Figure A.6 on page 597 shows the two most common sizes.

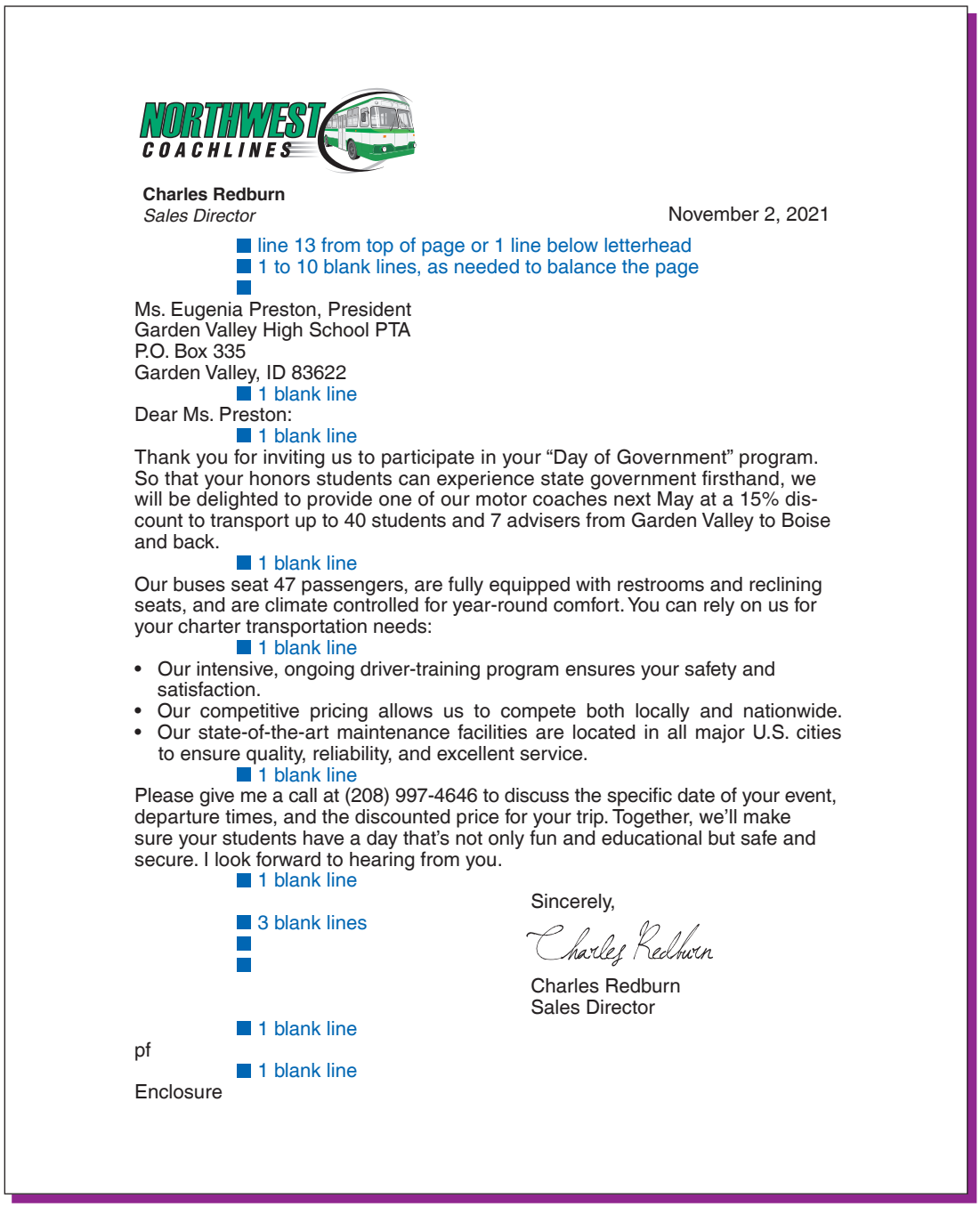


Figure A.4 **Modified Block Letter Format**

ADDRESSING THE ENVELOPE

No matter what size the envelope, the address is always single-spaced with all lines aligned on the left. The address on the envelope is in the same style as the inside address and presents the same information. The order to follow is from the smallest division to the largest:

1. Name and title of recipient
2. Name of department or subgroup
3. Name of organization
4. Name of building
5. Street address and suite number, or post office box number
6. City, state or province, and zip code or postal code
7. Name of country (if the letter is being sent abroad)

Because the U.S. Postal Service uses optical scanners to sort mail, envelopes for quantity mailings, in particular, should be addressed in the prescribed format. Everything is in capital letters, no punctuation is included, and all mailing instructions of interest to the post office are placed above the

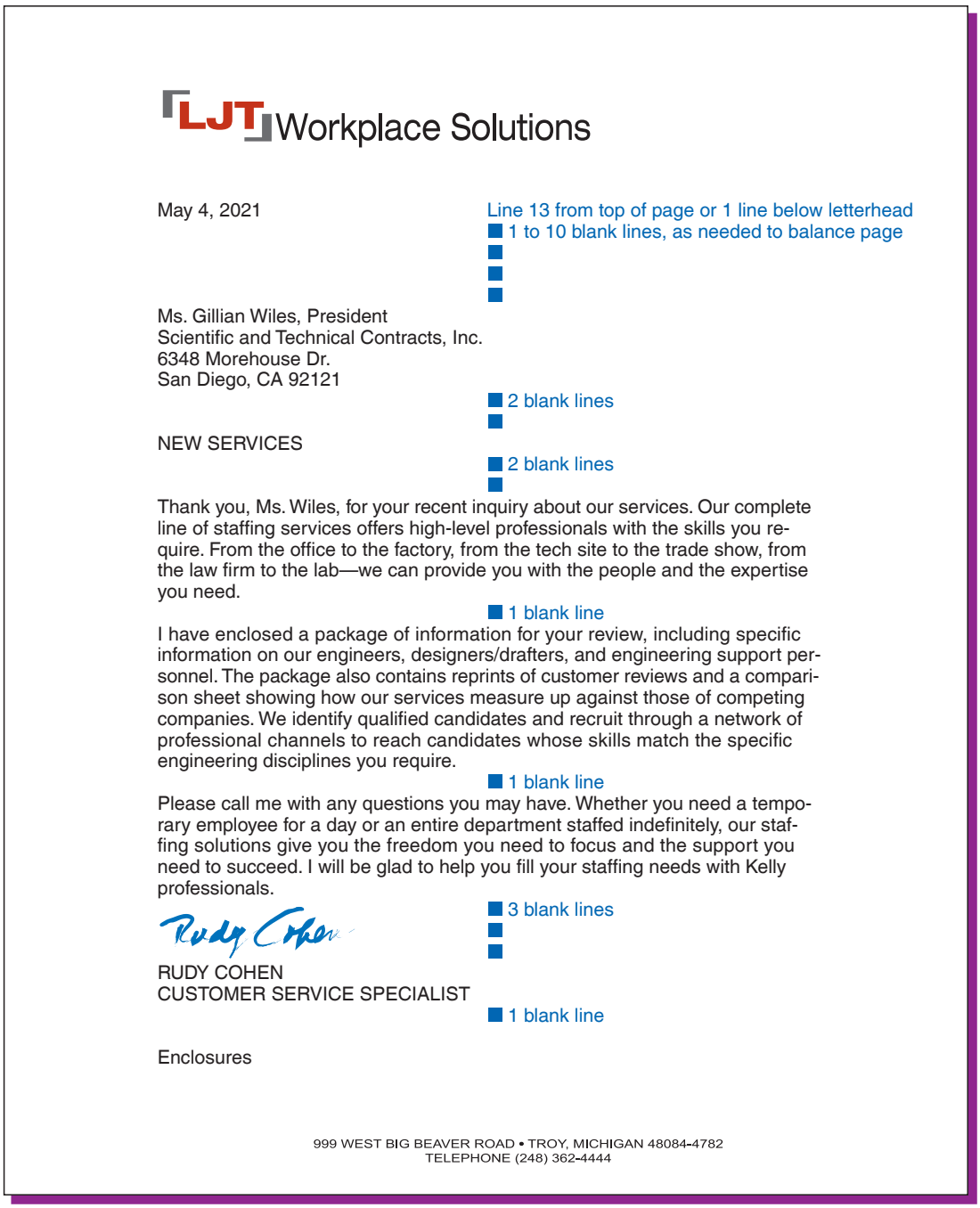


Figure A.5 **Simplified Letter Format**

address area (see Figure A.6). Canada Post requires a similar format, except that only the city is all in capitals, and the postal code is placed on the line below the name of the city. The post office scanners read addresses from the bottom up, so if a letter is to be sent to a post office box rather than to a street address, the street address should appear on the line above the box number. Figure A.6 also shows the proper spacing for addresses and return addresses.

The U.S. Postal Service and the Canada Post Corporation have published lists of two-letter mailing abbreviations for states, provinces, and territories (see Table A.4 on page 598). Postal authorities prefer no punctuation with these abbreviations. Quantity mailings should always follow post office requirements. For other letters, a reasonable compromise is to use traditional punctuation, uppercase and lowercase letters for names and street addresses, but two-letter state or province abbreviations, as shown here:

Mr. Kevin Kennedy
2107 E. Packer Dr.
Amarillo, TX 79108

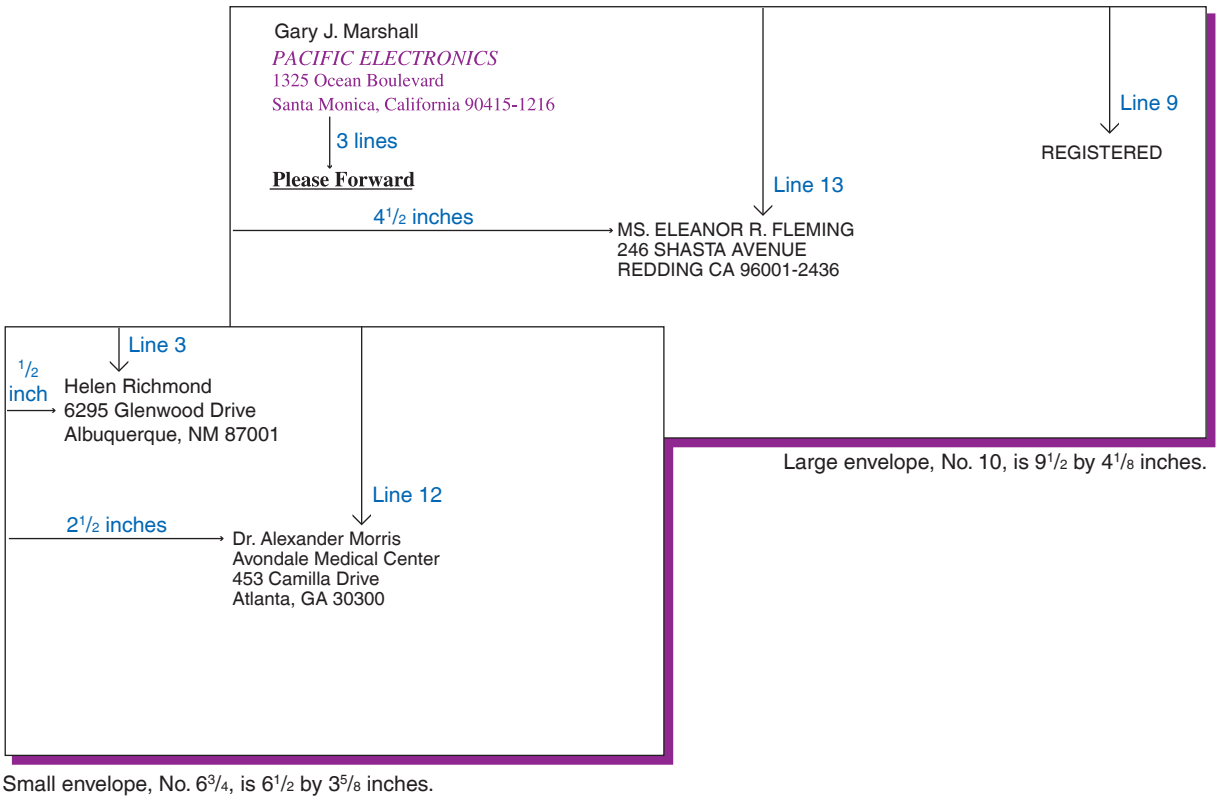


Figure A.6 Prescribed Envelope Format

Canadian postal codes are alphanumeric, with a three-character "area code" and a three-character "local code" separated by a single space (K2P 5A5). Zip and postal codes should be separated from state and province names by one space. Canadian postal codes may be treated the same or may be positioned alone on the bottom line of the address all by itself.

FOLDING TO FIT

The way a letter is folded also contributes to the recipient's overall impression of your organization's professionalism. When sending a standard-size piece of paper in a No. 10 envelope, fold it in thirds, with the bottom folded up first and the top folded down over it (see Figure A.7 on the next page); the open end should be at the top of the envelope and facing out. Fit smaller stationery neatly into the appropriate envelope simply by folding it in half or in thirds. When sending a standard-size letterhead in a No. 6¾ envelope, fold it in half from top to bottom and then in thirds from side to side.

INTERNATIONAL MAIL

Postal service differs from country to country, so it's always a good idea to investigate the quality and availability of various services before sending messages and packages internationally. Also, compare the services offered by delivery companies such as UPS and FedEx to find the best rates and options for each destination and type of shipment. No matter which service you choose, be aware that international mail requires more planning than domestic mail. For example, for anything beyond simple letters, you generally need to prepare *customs forms* and possibly other documents, depending on the country of destination and the type of shipment. You are responsible for following the laws of the United States and any countries to which you send mail and packages.

To prepare your mail for international delivery, follow the instructions provided at the U.S. Postal Service website (www.usps.com). There you'll find complete information on the international services available through the USPS, along with advice on addressing and packaging mail, completing customs forms, and calculating postage rates and fees. The *International Mail Manual*, also available on this website, offers the latest information and regulations for both outbound and inbound international mail. For instance, you can select individual country names to see current information about restricted or prohibited items and materials, required customs forms, and rates for various classes of service.[2] Various countries have specific and often extensive lists of items that may not be sent by mail at all or that must be sent using particular postal service options.

TABLE A.4 Two-Letter Mailing Abbreviations for the United States and Canada

State/Territory/ Province	Abbreviation	State/Territory/ Province	Abbreviation	State/Territory/ Province	Abbreviation
United States		Maryland	MD	Tennessee	TN
Alabama	AL	Massachusetts	MA	Texas	TX
Alaska	AK	Michigan	MI	Utah	UT
American Samoa	AS	Minnesota	MN	Vermont	VT
Arizona	AZ	Mississippi	MS	Virginia	VA
Arkansas	AR	Missouri	MO	Virgin Islands	VI
California	CA	Montana	MT	Washington	WA
Canal Zone	CZ	Nebraska	NE	West Virginia	WV
Colorado	CO	Nevada	NV	Wisconsin	WI
Connecticut	CT	New Hampshire	NH	Wyoming	WY
Delaware	DE	New Jersey	NJ	**Canada**	
District of Columbia	DC	New Mexico	NM	Alberta	AB
Florida	FL	New York	NY	British Columbia	BC
Georgia	GA	North Carolina	NC	Manitoba	MB
Guam	GU	North Dakota	ND	New Brunswick	NB
Hawaii	HI	Northern Mariana	MP	Newfoundland and Labrador	NL
Idaho	ID	Ohio	OH	Northwest Territories	NT
Illinois	IL	Oklahoma	OK	Nova Scotia	NS
Indiana	IN	Oregon	OR	Nunavut	NU
Iowa	IA	Pennsylvania	PA	Ontario	ON
Kansas	KS	Puerto Rico	PR	Prince Edward Island	PE
Kentucky	KY	Rhode Island	RI	Quebec	QC
Louisiana	LA	South Carolina	SC	Saskatchewan	SK
Maine	ME	South Dakota	SD	Yukon Territory	YT

Source: U.S. Postal Service, *Publication 28—Postal Addressing Standards.*

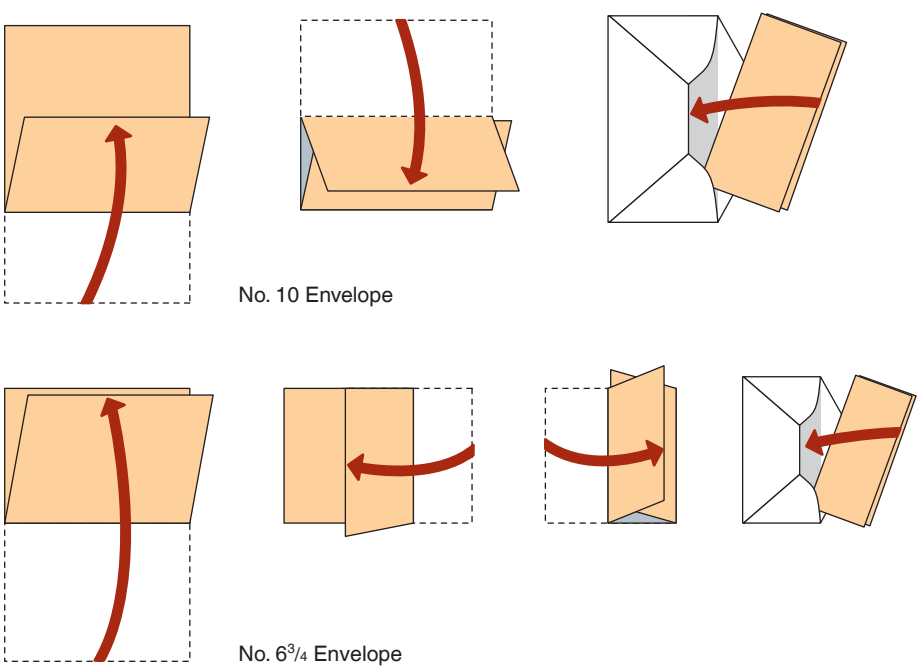


Figure A.7 Folding Standard-Size Letterhead

Memos

Digital media have replaced most internal printed memos in many companies, but you may have occasion to send printed memos from time to time. These can be simple announcements or messages, or they can be short reports using the memo format.

On your document, include a title such as MEMO or INTEROFFICE CORRESPONDENCE (all in capitals) centered at the top of the page or aligned with the left margin. Also at the top, include the words *To*, *From*, *Date*, and *Subject*—followed by the appropriate information—with a blank line between as shown here:

MEMO

TO:
FROM:
DATE:
SUBJECT:

Sometimes the heading is organized like this:

MEMO

TO:	FROM:
DATE:	SUBJECT:

The following guidelines will help you effectively format specific memo elements:

- **Addressees.** When sending a memo to a long list of people, include the notation *See distribution list* or *See below* in the *To* position at the top; then list the names at the end of the memo. Arrange this list alphabetically, except when high-ranking officials deserve more prominent placement. You can also address memos to groups of people—*All Sales Representatives*, *Production Group*, *New Product Team*.
- **Courtesy titles.** You need not use courtesy titles anywhere in a memo; first initials and last names, first names, or even initials alone are often sufficient. However, use a courtesy title if you would use one in a face-to-face encounter with the person.
- **Subject line.** The subject line of a memo helps busy colleagues quickly find out what your memo is about, so take care to make it concise and compelling.
- **Body.** Start the body of the memo on the second or third line below the heading. Like the body of a letter, it's usually single-spaced with blank lines between paragraphs. Indenting paragraphs is optional. Handle lists, important passages, and subheadings as you do in letters.
- **Second page.** If the memo carries over to a second page, head the second page just as you head the second page of a letter.
- **Writer's initials.** Unlike a letter, a memo doesn't require a complimentary close or a signature because your name is already prominent at the top. However, you may initial the memo—either beside the name appearing at the top of the memo or at the bottom of the memo.
- **Other elements.** Treat elements such as reference initials and copy notations just as you would in a letter. One difference between letters and memos is that while letters use the term *enclosure* to refer to other pieces included with the letter, memos usually use the word *attachment*.

Memos may be delivered by hand, by the post office (when the recipient works at a different location), or through interoffice mail. Interoffice mail may require the use of special reusable envelopes that have spaces for the recipient's name and department or room number; the name of the previous recipient is simply crossed out. If a regular envelope is used, the words *Interoffice Mail* appear where the stamp normally goes, so that it won't accidentally be stamped and mailed with the rest of the office correspondence.

Informal, routine, or brief reports for distribution within a company are often presented in memo form. Don't include report parts such as a table of contents and appendixes, but write the body of the memo report just as carefully as you'd write a formal report.

Reports

Enhance the effectiveness of your reports by paying careful attention to their appearance and layout. Follow whatever guidelines your organization prefers, always being neat and consistent throughout. If it's up to you to decide formatting questions, the following conventions may help you decide how to handle margins, headings, and page numbers.

MARGINS

All margins on a report page should be at least 1 inch wide. The top, left, and right margins are usually the same, but the bottom margins can be 1½ times deeper. Some special pages also have deeper top margins. Set top margins as deep as 2 inches for pages that contain major titles: prefatory parts (such as the table of contents or the executive summary), supplementary parts (such as the reference notes or bibliography), and textual parts (such as the first page of the text or the first page of each chapter).

If you're going to bind your report at the left or at the top, add half an inch to the margin on the bound edge (see Figure A.8 on the next page): The space taken by the binding on left-bound reports makes the center point of the text a quarter inch to the right of the center of the paper. Be sure to center headings between the margins, not between the edges of the paper.

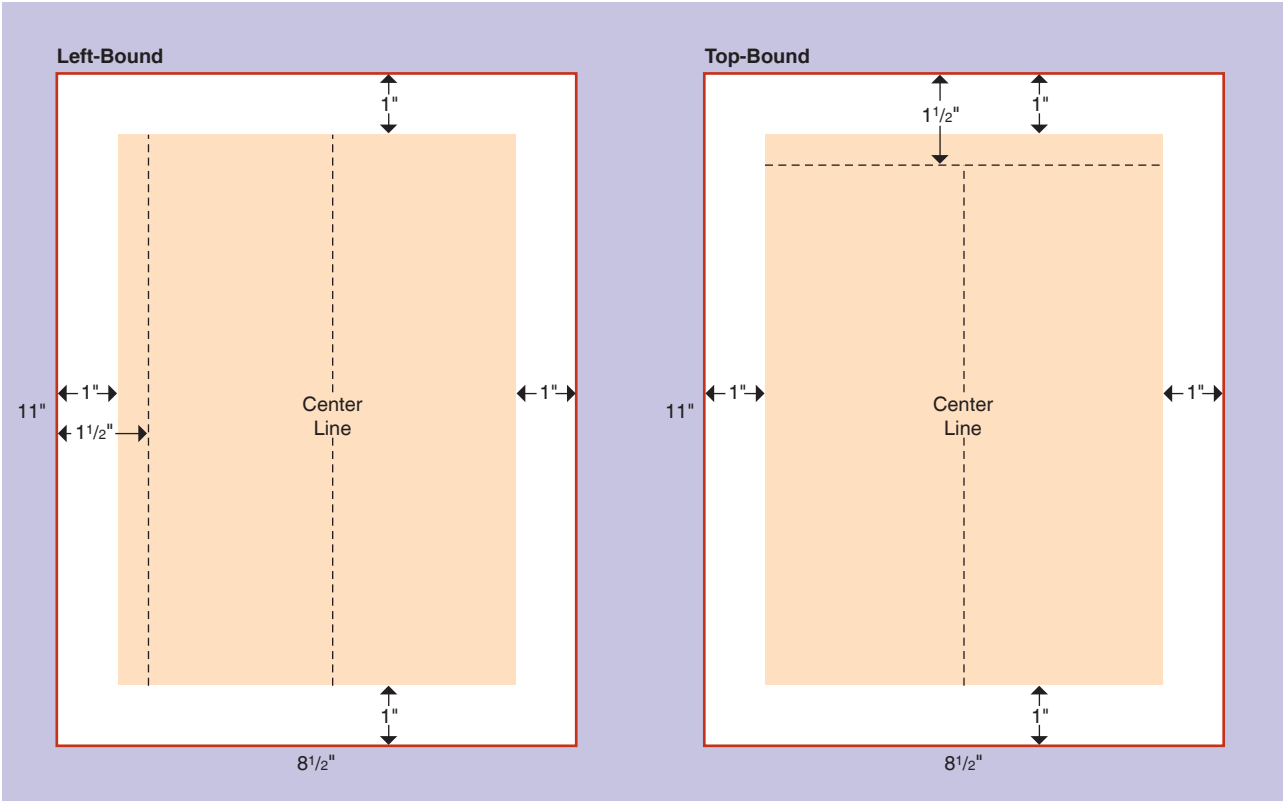


Figure A.8 **Margins for Formal Reports**

HEADINGS

If you don't have a template supplied by your employer, choose a design for headings and subheadings that clearly distinguishes the various levels in the hierarchy. The first-level headings should be the most prominent, on down to the lowest-level subheading.

PAGE NUMBERS

Every page in a report is counted; however, not all pages show numbers. The first page of the report, normally the title page, is unnumbered. All other pages in the prefatory section are numbered with a lowercase roman numeral, beginning with *ii* and continuing with *iii*, *iv*, *v*, and so on. Start numbering again with arabic numerals (1, 2, and so on) starting at the first page of the body.

You have many options for placing and formatting the page numbers, although these choices are usually made for you in a template. If you're not using a standard company template, position the page number where it is easy to see as the reader flips through the report. If the report will be stapled or otherwise bound along the left side, for instance, the best place for the page number is the upper right or lower right corner.

Endnotes

1. "How to Choose Paper Content?" Southworth, accessed 21 April 2018, www.southworth.com.
2. U.S. Postal Service, *International Mail Manual*, 5 March 2018, www.usps.gov.

B Documentation of Report Sources

By providing information about your sources, you improve your own credibility as well as the credibility of the facts and opinions you present. Documentation gives readers the means for checking your findings and pursuing the subject further. Also, documenting your report is the accepted way to give credit to the people whose work you have drawn from.

What style should you use to document your report? Experts recommend various forms, depending on your field or discipline. Moreover, your employer or client may use a form different from those the experts suggest. Don't let this discrepancy confuse you. If your employer specifies a form, use it; the standardized form is easier for colleagues to understand. However, if the choice of form is left to you, adopt one of the styles described here. Whatever style you choose, be consistent within any given report, using the same order, punctuation, and format from one reference citation or bibliography entry to the next.

A wide variety of style manuals provide detailed information on documentation. These publications explain the three most commonly used styles:

- American Psychological Association, *Publication Manual of the American Psychological Association*, 6th ed. (Washington, D.C.: American Psychological Association, 2013). Details the author-date system, which is preferred in the social sciences and often in the natural sciences as well.
- *The Chicago Manual of Style*, 17th ed. (Chicago: University of Chicago Press, 2017). Often referred to only as "*Chicago*" and widely used in the publishing industry; provides detailed treatment of source documentation and many other aspects of document preparation.
- *MLA Handbook*, 8th ed. (New York: Modern Language Association, 2016). Provides the citation guidelines most often used in the liberal arts and humanities.

Although many schemes have been proposed for organizing the information in source notes, all of them break the information into parts: (1) information about the author (name), (2) information about the work (title, edition, volume number), (3) information about the publication (place, publisher), (4) information about the date, and (5) information about location, including relevant page ranges.

The following sections summarize the major conventions for documenting sources in three styles: *The Chicago Manual of Style (Chicago)*, the *Publication Manual of the American Psychological Association (APA)*, and the *MLA Handbook (MLA)*.

Chicago Humanities Style

Chicago recommends two types of documentation systems. The *documentary-note*, or *humanities*, style gives bibliographic citations in notes—either footnotes (when printed at the bottom of a page) or endnotes (when printed at the end of the report). The humanities system is often used in literature, history, and the arts. The other system recommended by *Chicago* is the *author-date* system, which cites the author's last name and the date of publication in the text, usually in parentheses, reserving full documentation for the reference list (or bibliography). For the purpose of comparing styles, this section concentrates on the humanities system, which is described in detail in *Chicago*.

IN-TEXT CITATION—*CHICAGO* HUMANITIES STYLE

To document report sources in text, the humanities system relies on superscripts—arabic numerals placed just above the line of type at the end of the reference:

> Toward the end of his speech, Myers sounded a note of caution, saying that even though the economy is expected to grow, it could easily slow a bit.[10]

The superscript lets the reader know how to look for source information in either a footnote or an endnote (see Figure B.1 on the next page). Some readers prefer footnotes so that they can simply glance at the bottom of the page for information. Others prefer endnotes so that they can read the text without a clutter of notes on the page. Also, endnotes relieve the writer from worrying about how long each note will be and how much space it will take away from the page. Both footnotes and endnotes can be handled automatically by today's word-processing software.

For the reader's convenience, you can use footnotes for *content notes* (which may supplement your main text with asides about a particular issue or event, provide a cross-reference to another section of your report, or direct the

NOTES

Journal article with volume and issue numbers

1. Jonathan Clifton, "Beyond Taxonomies of Influence," *Journal of Business Communication* 46, no. 1 (2019): 57–79.

Brochure

2. BestTemp Staffing Services, *An Employer's Guide to Staffing Services,* 2d ed. (Denver: BestTemp Information Center, 2018), 31.

Newspaper article, no author

3. "Might Be Harder Than It Looks," *Los Angeles Times,* January 30 2020, sec. A, p. 22.

Annual report

4. The Walt Disney Company, *2018 Annual Report* (Burbank, Calif.: The Walt Disney Company, 2019), 48.

Magazine article

5. Kerry A. Dolan, "A Whole New Crop" *Forbes*, June 2, 2019, 72–75.

Television broadcast

6. Daniel Han, "Trade Wars Heating Up Around the Globe," *CNN Headline News* (Atlanta: CNN, March 5, 2019).

Website content

7. "Curves Fitness." *Curves*, accessed 5 May 2020. www.curves.com/fitness.

Book, component parts

8. Sonja Kuntz, "Moving Beyond Benefits," in *Our Changing Workforce,* ed. Randolf Jacobson, 213–27 (New York: Citadel Press, 2018).

Unpublished dissertation or thesis

9. George H. Morales, "The Economic Pressures on Industrialized Nations in a Global Economy" (Ph.D. diss., University of San Diego, 2017), 32–47.

Paper presented at a meeting

10. Charles Myers, "HMOs in Today's Environment" (paper presented at the Conference on Medical Insurance Solutions, Chicago, Ill., August 2018), 16–17.

Blog post

11. Seth Godin, "The Self-Healing Letter of Complaint," *Seth's Blog*, 4 May 2017, http://sethgodin.typepad.com/seths_blog/2017/05/the-self-healing-letter-of-complaint.html.

Interview

12. Georgia Stainer, general manager, Day Cable and Communications, interview by author, Topeka, Kan., March 2, 2020.

Newspaper article, one author

13. Evelyn Standish, "Global Market Crushes OPEC's Delicate Balance of Interests," *Wall Street Journal,* January 19, 2016, sec. A, p. 1.

Book, two authors

14. Miriam Toller and Jay Fielding, *Global Business for Smaller Companies* (Rocklin, Calif.: Prima Publishing, 2019), 102–3.

Government publication

15. U.S. Department of Defense, *Stretching Research Dollars: Survival Advice for Universities and Government Labs* (Washington, D.C.: GPO, 2018), 126.

Online video

16. Adam Grant, "The Surprising Habits of Original Thinkers," TED video, filmed February 2016; available from www.ted.com/talks/adam_grant_the_surprising_habits_of_original_thinkers.

Figure B.1 Sample Endnotes–Chicago Humanities Style
(Note: This is a collection of sample entries, not a page from an actual report; dates shown may not reflect actual sources. Also, *Chicago* doesn't specify blank lines between entries; that was done here for clarity.)

reader to a related source). Then you can use endnotes for *source notes* (which document direct quotations, paraphrased passages, and visual aids). Consider which type of note is most common in your report, and then choose whether to present these notes all as endnotes or all as footnotes. Regardless of the method you choose for referencing textual information in your report, notes for visual aids (both content notes and source notes) are placed on the same page as the visual.

BIBLIOGRAPHY—*CHICAGO* HUMANITIES STYLE

The humanities system may or may not be accompanied by a bibliography (because the notes give all the necessary bibliographic information). However, endnotes are arranged in order of appearance in the text, so an alphabetical bibliography can be valuable to your readers. The bibliography may be titled *Bibliography*, *Reference List*, *Sources*, *Works Cited* (if you include only those sources you actually cited in your report), or *Works Consulted* (if you include uncited sources as well). This list of sources may also serve as a reading list for those who want to pursue the subject of your report further, so you may want to annotate each entry—that is, comment on the subject matter and viewpoint of the source, as well as on its usefulness to readers. Annotations may be written in either complete or incomplete sentences. A bibliography may also be more manageable if you subdivide it into categories (a classified bibliography), either by type of reference (such as books, articles, and unpublished material) or by subject matter (such as government regulations, market forces, and so on).

BIBLIOGRAPHY

Blog post (usually not included in *Chicago*-style bibliography unless you cite the blog frequently)

Godin, Seth. "The Self-Healing Letter of Complaint," *Seth's Blog*, May 4, 2017, http://sethgodin.typepad.com/seths_blog/2017/05/the-self-healing-letter-of-complaint.html.

Brochure

BestTemp Staffing Services. *An Employer's Guide to Staffing Services.* 2d ed. Denver: BestTemp Information Center, 2018.

Journal article with volume and issue numbers

Clifton, Jonathan. "Beyond Taxonomies of Influence." *Journal of Business Communication* 46, no. 1 (2019): 57–79.

Magazine article

Dolan, Kerry A. "A Whole New Crop," *Forbes*, June 2, 2019, 72–75.

Online video

Grant, Adam. "The Surprising Habits of Original Thinkers." Filmed February 2016. TED video, 15:25. Posted April 2016. www.ted.com/talks/adam_grant_the_surprising_habits_of_original_thinkers.

Television broadcast

Han, Daniel. "Trade Wars Heating Up Around the Globe." *CNN Headline News.* Atlanta: CNN, 5 March 2019.

Website content

"Curves Fitness." *Curves*, accessed May 5, 2020. www.curves.com/fitness.

Book, component parts

Kuntz, Sonja. "Moving Beyond Benefits." In *Our Changing Workforce*, edited by Randolf Jacobson, 52–67. New York: Citadel Press, 2018.

Newspaper article, no author

"Might Be Harder Than It Looks." *Los Angeles Times,* January 30, 2020, sec. A, p. 22.

Unpublished dissertation or thesis

Morales, George H. "The Economic Pressures on Industrialized Nations in a Global Economy." Ph.D. diss., University of San Diego, 2017.

Paper presented at a meeting

Myers, Charles. "HMOs in Today's Environment." Paper presented at the Conference on Medical Insurance Solutions, Chicago, Ill., August 2018.

Interview

Stainer, Georgia, general manager, Day Cable and Communications. Interview by author. Topeka, Kan., 2 March 2020.

Newspaper article, one author

Standish, Evelyn. "Global Market Crushes OPEC's Delicate Balance of Interests." *Wall Street Journal,* January 19, 2016, sec. A, p. 1.

Book, two authors

Toller, Miriam, and Jay Fielding. *Global Business for Smaller Companies.* Rocklin, Calif.: Prima Publishing, 2019.

Government publication

U.S. Department of Defense. *Stretching Research Dollars: Survival Advice for Universities and Government Labs.* Washington, D.C.: GPO, 2018.

Annual report

The Walt Disney Company, *2018 Annual Report,* Burbank, Calif.: The Walt Disney Company, 2019.

Figure B.2 Sample Bibliography–*Chicago* Humanities Style
(Note: This is a collection of sample entries, not a page from an actual report; dates shown may not reflect actual sources. Also, *Chicago* doesn't specify blank lines between entries; that was done here for clarity.)

Following are the major conventions for developing a bibliography according to *Chicago* style (see Figure B.2):

- Exclude any page numbers that may be cited in source notes, except for journals, periodicals, newspapers, and book chapter page ranges.
- Alphabetize entries by the last name of the lead author (listing last name first). The names of second and succeeding authors are listed in normal order. Entries without an author name are alphabetized by the first important word in the title.
- Format entries as hanging indents (indent the second and succeeding lines three to five spaces).
- Arrange entries in the following general order: (1) author name, (2) title information, (3) publication information, (4) date, (5) periodical page range.
- Use quotation marks around the titles of articles from magazines, newspapers, and journals. Capitalize the first and last words, as well as all other important words (except prepositions, articles, and coordinating conjunctions).
- Use italics to set off the names of books, newspapers, journals, and other complete publications. Capitalize the first and last words, as well as all other important words.
- For journal articles, include the volume number and the issue number (if necessary). Include the year of publication inside parentheses and follow with a colon and the page range of the article: *Journal of Business Communication* 46, no. 1 (2009): 57–79. (In this source, the volume is 46, the number is 1, and the page range is 57–79.)

- Use brackets to identify all electronic references: [Online database] or [CD-ROM].
- Explain how electronic references can be reached if it's not obvious from the URL.
- Give the access date for online references: Accessed August 23, 2021.

APA Style

The American Psychological Association (APA) recommends the author-date system of documentation, which is popular in the physical, natural, and social sciences. When using this system, you simply insert the author's last name and the year of publication within parentheses following the text discussion of the material cited. Include a page number if you use a direct quotation. This approach briefly identifies the source so that readers can locate complete information in the alphabetical reference list at the end of the report. The author-date system is both brief and clear, saving readers time and effort.

IN-TEXT CITATION—APA STYLE

To document report sources in text using APA style, insert the author's surname and the date of publication at the end of a statement. Enclose this information in parentheses. If the author's name is referred to in the text itself, then the name can be omitted from parenthetical material.

> Some experts recommend both translation and back-translation when dealing with any non-English-speaking culture (Clifton, 2019).

> Toller and Fielding (2019) make a strong case for small companies succeeding in global business.

Personal communications and interviews conducted by the author would not be listed in the reference list. Such citations appear in the text only.

> Increasing the role of cable companies is high on the list of Georgia Stainer, general manager at Day Cable and Communications (personal communication, March 2, 2020).

LIST OF REFERENCES—APA STYLE

For APA style, list only those works actually cited in the text (so you would not include works for background or for further reading). Following are the major conventions for developing a reference list according to APA style (see Figure B.3):

- Format entries as hanging indents.
- List all author names in reverse order (last name first), and use only initials for the first and middle names.
- Arrange entries in the following general order: (1) author name, (2) date, (3) title information, (4) publication information, (5) periodical page range.
- Follow the author name with the date of publication in parentheses.
- List titles of articles from magazines, newspapers, and journals without underlines or quotation marks. Capitalize only the first word of the title, any proper nouns, and the first word to follow an internal colon. Italicize titles of books, capitalizing only the first word, any proper nouns, and the first word to follow a colon.
- Italicize titles of magazines, newspapers, journals, and other complete publications. Capitalize all the important words in the title.
- For journal articles, include the volume number (in italics) and, if necessary, the issue number (in parentheses). Finally, include the page range of the article: *Journal of Business Communication*, *46*(1), 57–79. (In this example, the volume is 46, the number is 1, and the page range is 57–79.)
- Include personal communications (such as letters, memos, emails, and conversations) only in text, not in reference lists.
- Electronic references include author, date of publication, title of article, name of publication (if one), volume, and the URL.
- For electronic references, indicate the actual year of publication.
- For webpages with extremely long URLs, use your best judgment to determine which URL from the site to use. For example, rather than giving the long URL of a specific news release, you can provide the URL of the "Media relations" webpage.
- APA citation guidelines for social media are still evolving. For the latest information, visit the APA Style Blog (blog.apastyle.org).
- For online journals or periodicals that assign a digital object identifier (DOI), include that instead of a conventional URL. If no DOI is available, include the URL of the publication's homepage.

MLA Style

The style recommended by the Modern Language Association of America is used widely in the humanities, especially in the study of language and literature. Like APA style, MLA style uses brief parenthetical citations in the text. However, instead of including author name and year, MLA citations include author name and page reference.

IN-TEXT CITATION—MLA STYLE

To document report sources in text using MLA style, insert the author's last name and a page reference inside parentheses following the cited material: (Matthews 63). If the author's name is mentioned in the text reference, the name can be omitted from the parenthetical citation: (63). The citation

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Blog post

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Unpublished dissertation or thesis

Morales, G. H. (2017). *The economic pressures on industrialized nations in a global economy*. Unpublished doctoral dissertation, University of San Diego.

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Myers, C. (2018, August). *HMOs in today's environment*. Paper presented at the Conference on Medical Insurance Solutions, Chicago, IL.

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Newspaper article, one author

Standish, E. (2016, January 19). Global market crushes OPEC's delicate balance of interests. *Wall Street Journal*, p. A1.

Book, two authors

Toller, M., & Fielding, J. (2019). *Global business for smaller companies*. Rocklin, CA: Prima Publishing.

Government publication

U.S. Department of Defense. (2018). *Stretching research dollars: Survival advice for universities and government labs*. Washington, DC: U.S. Government Printing Office.

Annual report

The Walt Disney Company. (2019). *2018 Annual report,* Burbank, CA: The Walt Disney Company.

Figure B.3 Sample References–APA Style
(Note: This is a collection of sample references, not a page from an actual report; dates shown may not reflect actual sources. Also, it is single-spaced as is the norm for business reports; APA references are double-spaced in academic reports.)

indicates that the reference came from page 63 of a work by Matthews. With the author's name, readers can find complete publication information in the alphabetically arranged list of works cited that comes at the end of the report.

> Some experts recommend both translation and back-translation when dealing with any non-English-speaking culture (Clifton 57).

> Toller and Fielding make a strong case for small companies succeeding in global business (102–03).

The *MLA Handbook* offers advice on handling multiple authors, multiple works by a single author, and other details of in-text references.

LIST OF WORKS CITED—MLA STYLE

In MLA style, all the research sources that were cited are gathered in a section titled Works Cited, with that title centered at the top of the page. Alphabetize entries by the author's last name or the title of the work if there is no author.

In the 8th edition of the *MLA Handbook*, the MLA significantly changed its approach to citation guidelines. In response to the proliferation of new media formats in recent years, the handbook no longer provides specific citation guidelines for every conceivable type of media item. Instead, it offers general guidelines that you can adapt to each item you need to cite.

The MLA approach is built on three principles:

- Include the basic identifiers common to most sources, such as author name(s), the title of the work, and the date of publication or access.
- Recognize that there can be multiple "right" ways to document a source, depending on the circumstances.
- If you have any doubt about what to include, do what is best for your readers. For example, if the readers of a report are likely to retrieve the materials to continue their own research, you'll need to provide more information than if you are simply giving credit to the authors of the materials you used.

Each entry can have up to nine parts if they are relevant to the project's and readers' needs, although most on-the-job reports won't need that many:

- **Author name(s).** Start with the lead author's name in reverse order (last name first), using either full first name or initials, followed by a period. If the source has two authors, list the second author's name in regular order. If the source has three or more authors, reverse the first name, then follow it with a comma and *et al* ("and others"). If no author name is available, such as with many corporate or governmental publications, begin the citation with the title of the work and use the organization's name as the publisher. An exception to this rule is if one organization wrote the piece and another published it, in which case list the former as the author.
- **Title of source.** Use the full title of the source, including any subtitles. Capitalize every word except articles, prepositions, coordinating conjunctions, and the *to* in infinitives, and put a period at the end of the title. If the source is one of multiple items in a *container* (see next bullet), such as an article within a magazine or on a website, put quotation marks around the title. If it is not part of a larger entity (as is the case with a book, for example), put the title in italics. This distinction applies to audio and video material as well. The title of a podcast channel, for instance, is set in italics, whereas the title of an individual podcast episode from that channel is enclosed in quotation marks. For email messages, use the subject line of the message as the title, enclosed in quotation marks and capitalized as above. For tweets, use the entire tweet, enclosed in quotation marks, and apply whatever capitalization and punctuation appear in the original.
- **Title of container.** The MLA uses *container* to refer to any entity that contains multiple sources. Books, periodicals, television series, and websites are all containers, for example. Capitalize container titles as described under source titles, and put a period at the end of them. If a source is embedded in more than one container, such as an article in a journal (container 1), which you found in an online database (container 2), include information for all the containers.
- **Other contributors.** If other named individuals were involved in the creation and production of the source, such as editors or translators, include their role(s) and name(s) next, such as "Edited by Josie Waler."
- **Version.** If a source has been released in multiple versions, such as the various editions of a book, indicate that next. The third edition of a book would be denoted as "3rd ed." followed by a comma.
- **Number.** If the source is part of a numbered sequence and this information is relevant to the project and important to readers, include that as well. Academic journals, for example, are typically identified by volume (usually corresponding to an entire year) and number (corresponding to one issue).
- **Publisher.** The publisher is the organization primarily responsible for producing the source material. This could be a book publisher, the owner of a website, or the production company behind a TV series. If you are citing an article found on Apple's website, for example, Apple is the name of the publisher.
- **Publication and access dates.** Include the date or dates most meaningful to readers in the context of the project. Use the day-month-year style, and include the time if that is relevant. You can abbreviate months to save space. Periodicals, books, tweets, and email messages all have specific publication dates. Website content and blog posts may or may not show a date. If an online source is undated, use "Accessed" followed by the date.
- **Location.** This can refer to the specific location within a source or the source's location within a container. For print sources, this usually involves page numbers, such as the pages you referenced from a book or the location of a magazine article within an issue. Use "p." to denote a single page and "pp." to denote a range of pages. For online sources, the location is usually the URL where the item can be found. How much of the URL to include is a matter of judgment, based on how long the URL is, whether your readers will want to access the source, and whether your document is print or digital. If the URL is extremely long, you might want to use the URL of the website's homepage. Many publishers now provide digital object identifiers (DOIs), which are more stable than URLs. If a DOI is available, use it instead.

If other information will help the reader or clarify the source of your information, include it as well. For example, if you used information you heard in a lecture, add "Lecture" at the end of the entry. If your source was a transcript of a podcast or video, add "Transcript."

Figure B.4 shows a variety of items in MLA citation format. Bear in mind, however, that given the flexibility the MLA now embraces, some of these entries could be configured differently for various contexts and still be correct.

WORKS CITED

Blog post

Godin, Seth. "The Self-Healing Letter of Complaint." *Seth's Blog*, 4 May 2017, sethgodin.typepad.com/seths_blog/2017/05/the-self-healing-letter-of-complaint.html.

Brochure

An Employer's Guide to Staffing Services. 2d ed. BestTemp Staffing Services, 2018.

Journal article with volume and issue numbers

Clifton, Jonathan. "Beyond Taxonomies of Influence." *Journal of Business Communication* vol. 46, no. 1, 2019, pp. 57–79.

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Toller, Miriam, and Jay Fielding. *Global Business for Smaller Companies*. Prima Publishing, 2019.

Government publication, separate author and publisher

United States Department of Defense. *Stretching Research Dollars: Survival Advice for Universities and Government Labs*. GPO, 2018.

Annual report

Walt Disney Company, *2018 Annual Report*. Walt Disney Company, 2019.

Figure B.4 Sample Works Cited–MLA Style
(Note: This is a collection of sample references, not a page from an actual report; dates shown may not reflect actual sources. Also, it is single-spaced as is the norm for business reports; MLA works cited are double-spaced in academic reports.)

C Correction Symbols

Symbol	Meaning	Symbol Used in Context	Corrected Copy
Corrections			
	Close up space	self- confidence	self-confidence
	Delete	harrassment and abuse	harassment
	Insert	tirquoise shirts	turquoise and white shirts
	Insert apostrophe	our teams goals	our team’s goals
	Insert comma	a, b and c	a, b, and c
	Insert hyphen	third quarter sales	third-quarter sales
	Insert period	Harrigan et al	Harrigan et al.
	Insert quotation marks	This team isn’t cooperating.	This “team” isn’t cooperating.
	Insert space	realestate testcase	real estate test case
	Capitalize	Pepsico, Inc.	PepsiCo, Inc.
	Lowercase	TULSA, South of here	Tulsa, south of here
	Spell out	COD	cash on delivery
	Spell out	Assn. of Biochem. Engrs.	Association of Biochemical Engineers
	Transpose	airy, light, casual tone	light, airy, casual tone
	Restore	staff talked openly and frankly	staff talked openly
Alignment and Repositioning			
	Align horizontally	meaningful result	meaningful result
	Align vertically	1. Power cable 2. Keyboard	1. Power cable 2. Keyboard
	Center	Awards Banquet	Awards Banquet
	Double-space	text in first line text in second line	text in first line text in second line
	Move down	Sincerely,	Sincerely,
	Move left	Attention: Security	Attention: Security
	Move right	February 2, 2021	February 2, 2021
	Move up	THIRD-QUARTER SALES	THIRD-QUARTER SALES
	Run lines together	Manager, Distribution	Manager, Distribution

Symbol	Meaning	Symbol Used in Context	Corrected Copy
ss	Single space	text in first line ss text in second line	text in first line text in second line
⌐	Start new line	Marla Fenton, Manager, Distri- bution	Marla Fenton, Manager, Distribution
¶	Start new paragraph	¶ The solution is easy to determine but difficult to implement in a competitive environment like the one we now face.	The solution is easy to determine but difficult to implement in a competitive environment like the one we now face.
Type Treatment			
bf	Boldface	Recommendations bf	**Recommendations**
ital	Italics	Quarterly Report ital	*Quarterly Report*

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Handbook of Grammar, Mechanics, and Usage

The rules of grammar, mechanics, and usage provide the guidance every professional needs in order to communicate successfully with colleagues, customers, and other audiences. These rules help you in two important ways. First, they determine how meaning is encoded and decoded in the communication process. If you don't encode your messages using the same rules your readers or listeners use to decode them, chances are your audiences will not extract your intended meaning from your messages. Without a firm grasp of the basics of grammar, mechanics, and usage, you risk being misunderstood, damaging your company's image, losing money for your company, and possibly even losing your job. In other words, if you want to get your point across, you need to follow the rules of grammar, mechanics, and usage. Second, apart from successfully transferring meaning, following the rules tells your audience that you respect the conventions and expectations of the business community.

You can think of *grammar* as the agreed-on structure of a language, the way that individual words are formed, and the manner in which those words are then combined to form meaningful sentences. *Mechanics* are style and formatting issues such as capitalization, spelling, and the use of numbers and symbols. *Usage* involves the accepted and expected way in which specific words are used by a particular community of people—in this case, the community of businesspeople who use English. This handbook can help you improve your knowledge and awareness in all three areas. It is divided into the following sections:

- **Diagnostic Test of English Skills.** Testing your current knowledge of grammar, mechanics, and usage helps you find out where your strengths and weaknesses lie. This test offers 50 items taken from the topics included in this handbook.
- **Assessment of English Skills.** After completing the diagnostic test, use the assessment form to highlight the areas you most need to review.
- **Essentials of Grammar, Mechanics, and Usage.** This section helps you quickly review the basics. You can study the things you've probably already learned but may have forgotten about grammar, punctuation, mechanics (including capitalization, abbreviation, number style, and word division), and vocabulary (including frequently confused words, frequently misused words, frequently misspelled words, and transitional words and phrases). Use this essential review not only to study and improve your English skills but also as a reference for any questions you may have during this course.

Diagnostic Test of English Skills

Use this test to determine whether you need more practice with grammar, punctuation, mechanics, or vocabulary. When you've answered all the questions, ask your instructor for an answer sheet so that you can score the test. On the Assessment of English Skills form (page 613), record the number of questions you answered incorrectly in each section.

The following choices apply to items 1–5. Write in each blank the letter of the choice that best describes the part of speech that is underlined.

A. noun
B. pronoun
C. verb
D. adjective
E. adverb
F. preposition
G. conjunction
H. article

____ **1.** The new branch location will be decided <u>by</u> next week.
____ **2.** We must hire only <u>qualified</u>, ambitious graduates.
____ **3.** After their <u>presentation</u>, I was still undecided.
____ **4.** See <u>me</u> after the meeting.
____ **5.** Margaret, pressed for time, turned in <u>unusually</u> sloppy work.

In the blanks for items 6–15, write the letter of the word or phrase that best completes each sentence.

____ **6.** (A. Russ's, B. Russ') laptop was stolen last week.
____ **7.** Speaking only for (A. me, B. myself), I think the new policy is discriminatory.
____ **8.** Of the five candidates we interviewed yesterday, (A. who, B. whom) do you believe is the best choice?
____ **9.** India has increased (A. it's, B. its) imports of corn and rice.

____ **10.** Either the New York head office or the regional offices will need to reduce (A. their, B. its) staffing costs.
____ **11.** If the IT department can't (A. lie, B. lay) the fiber-optic cable by March 1, the plant will not open on schedule.
____ **12.** Starbucks (A. is, B. are) opening five new stores in San Diego in the next year.
____ **13.** The number of women-owned small businesses (A. has, B. have) increased sharply in the past two decades.
____ **14.** Greg and Bernyce worked (A. good, B. well) together.
____ **15.** They distributed the supplies (A. among, B. between) the six staff members.

The following choices apply to items 16–20. Identify the issue that best describes the problem with each sentence's structure.

A. sentence fragment
B. comma splice
C. misplaced modifier
D. fused sentence
E. lack of parallelism
F. unclear antecedent

____ **16.** The number of employees who took the buyout offer was much higher than expected, now the entire company is understaffed.
____ **17.** The leader in internet-only banking.
____ **18.** Diamond doesn't actually sell financial products rather it acts as an intermediary.
____ **19.** Helen's proposal is for not only the present but also for the future.
____ **20.** When purchasing luxury products, quality is more important than price for consumers.

For items 21–30, circle the letter of the preferred choice in each of the following groups of sentences.

21. A. What do you think of the ad slogan "Have it your way?"
B. What do you think of the ad slogan "Have it your way"?

22. A. Send copies to Jackie Cross, Uniline, Brad Nardi, Peale & Associates, and Tom Griesbaum, MatchMakers.
B. Send copies to Jackie Cross, Uniline; Brad Nardi, Peale & Associates; and Tom Griesbaum, MatchMakers.

23. A. They've recorded 22 complaints since yesterday, all of them from long-time employees.
B. They've recorded 22 complaints since yesterday; all of them from long-time employees.

24. A. We are looking for two qualities in applicants: experience with computers and an interest in people.
B. We are looking for two qualities in applicants; experience with computers and an interest in people.

25. A. At the Center for the Blind the clients we serve have lost vision, due to a wide variety of causes.
B. At the Center for the Blind, the clients we serve have lost vision due to a wide variety of causes.

26. A. Replace your standard light bulbs with new, compact fluorescent bulbs.
B. Replace your standard light bulbs with new, compact, fluorescent bulbs.
C. Replace your standard light bulbs with new compact fluorescent bulbs.

27. A. Blue Cross of California may have changed its name to Anthem Blue Cross but the company still has the same commitment to California.
B. Blue Cross of California may have changed its name to Anthem Blue Cross, but the company still has the same commitment to California.

28. A. Only eight banks in this country—maybe nine can handle transactions of this magnitude.
B. Only eight banks in this country—maybe nine—can handle transactions of this magnitude.

29. A. Instead of focusing on high-growth companies, we targeted mature businesses with only one or two people handling the decisions.
B. Instead of focusing on high growth companies, we targeted mature businesses with only one or two people handling the decisions.

30. A. According to board president Damian Cabaza "having a crisis communication plan is a high priority."
B. According to board president Damian Cabaza, "Having a crisis communication plan is a high priority."

For items 31–40, select the best choice from among those provided.

31. A. At her previous employer, Mary-Anne worked in Marketing Communications and Human Resources.
B. At her previous employer, Mary-Anne worked in marketing communications and human resources.

32. A. By fall, we'll have a dozen locations between the Mississippi and Missouri rivers.
B. By Fall, we'll have a dozen locations between the Mississippi and Missouri Rivers.

33. A. The Board applauded President Donlan upon her reelection for a fifth term.
B. The board applauded president Donlan upon her reelection for a fifth term.
C. The board applauded President Donlan upon her reelection for a fifth term.

34. A. If you want to travel to France, you need to be au courant with the business practices.
B. If you want to travel to France, you need to be "au courant" with the business practices.

35. A. As the company's CEO, Thomas Spurgeon handles all dealings with the FDA.

B. As the company's C.E.O., Thomas Spurgeon handles all dealings with the F.D.A.

36. A. The maximum speed limit in most states is 65 mph.

B. The maximum speed limit in most states is 65 m.p.h.

37. A. Sales of graphic novels increased nine percent between 2016 and 2017.

B. Sales of graphic novels increased 9 percent between 2016 and 2017.

38. A. Our store is open daily from nine a.m. to seven p.m.

B. Our store is open daily from 9:00 a.m. to 7:00 p.m.

39. A. The organizing meeting is scheduled for July 27, and the event will be held in January 2022.

B. The organizing meeting is scheduled for July 27th, and the event will be held in January, 2022.

40. A. We need six desks, eight file cabinets, and 12 trashcans.

B. We need 6 desks, 8 file cabinets, and 12 trashcans.

For items 41–50, write in each blank the letter of the word that best completes each sentence.

____ **41.** Will having a degree (A. affect, B. effect) my chances for promotion?

____ **42.** Try not to (A. loose, B. lose) this key; we will charge you a fee to replace it.

____ **43.** I don't want to discuss my (A. personal, B. personnel) problems in front of anyone.

____ **44.** Let us help you choose the right tie to (A. complement, B. compliment) your look.

____ **45.** The repairman's whistling (A. aggravated, B. irritated) all of us in accounting.

____ **46.** The bank agreed to (A. loan, B. lend) the Smiths $20,000 for their start-up.

____ **47.** The credit card company is (A. liable, B. likely) to increase your interest rate if you miss a payment.

____ **48.** The airline tries to (A. accommodate, B. accomodate) disabled passengers.

____ **49.** Every company needs a policy regarding sexual (A. harrassment, B. harassment).

____ **50.** Use your best (A. judgment, B. judgement) in selecting a service provider.

Assessment of English Skills

In the space provided, record the number of questions you answered incorrectly.

Questions	Skills Area	Number of Incorrect Answers
1–5	Parts of speech	_____
6–15	Usage	_____
16–20	Sentence structure	_____
21–30	Punctuation	_____
31–40	Mechanics	_____
41–50	Vocabulary	_____

If you had more than two incorrect answers in any of the skills areas, focus on those areas in the appropriate sections of this handbook.

Essentials of Grammar, Mechanics, and Usage

The following sentence looks innocent, but is it really?

> We sell tuxedos as well as rent.

You sell tuxedos, but it's highly unlikely that you sell rent—which is what this sentence says. Whatever you're selling, some people will ignore your message because of a blunder like this. The following sentence has a similar problem:

> Vice President Eldon Neale told his chief engineer that he would no longer be with Avix, Inc., as of June 30.

Is Eldon or the engineer leaving? No matter which side the facts are on, the sentence can be read the other way. Now look at this sentence:

> The year before we budgeted more for advertising sales were up.

Confused? Perhaps this is what the writer meant:

> The year before, we budgeted more for advertising. Sales were up.

Or maybe the writer meant this:

> The year before we budgeted more for advertising, sales were up.

These examples show that even short, simple sentences can be misunderstood because of errors on the part of the writer. As you've learned in numerous courses over your schooling, an English sentence consists of the parts of speech being combined with punctuation, mechanics, and vocabulary to convey meaning. Making a point of brushing up on your grammar, punctuation, mechanics, and vocabulary skills will help ensure that you create clear, effective business messages.

1.0 Grammar

Grammar is the study of how words come together to form sentences. Categorized by meaning, form, and function, English words fall into various parts of speech: nouns,

pronouns, verbs, adjectives, adverbs, prepositions, conjunctions, articles, and interjections. You will communicate more clearly if you understand how each of these parts of speech operates in a sentence.

1.1 NOUNS

A **noun** names a person, a place, a thing, or an idea. Anything you can see or detect with one of your senses has a noun to name it. Some things you can't see or sense are also nouns—ions, for example, or space. So are things that exist as ideas, such as accuracy and height. (You can see that something is accurate or that a building is tall, but you can't see the idea of accuracy or the idea of height.) These names for ideas are known as abstract nouns. The simplest nouns are the names of things you can see or touch: *car*, *building*, *cloud*, *brick*; these are termed concrete nouns. A few nouns, such as *algorithm*, *software*, and *code*, are difficult to categorize as either abstract or concrete but can reasonably be considered concrete even though they don't have a physical presence.

1.1.1 Proper Nouns and Common Nouns

So far, all the examples of nouns have been common nouns, referring to general classes of things. The word *building* refers to a whole class of structures. Common nouns such as *building* are not capitalized.

If you want to talk about one particular building, however, you might refer to the Glazier Building. The name is capitalized, indicating that *Glazier Building* is a proper noun.

Here are three sets of common and proper nouns for comparison:

Common	Proper
city	Kansas City
company	Blaisden Company
store	Books Galore

1.1.2 Nouns as Subject and Object

Nouns may be used in sentences as subjects or objects. That is, the person, place, thing, or idea that is being or doing (subject) is represented by a noun. So is the person, place, idea, or thing that is being acted on (object). In the following sentence, the nouns are underlined:

> The web designer created the homepage.

The web designer (subject) is acting in a way that affects the homepage (object). The following sentence is more complicated:

> The installer delivered the carpet to the customer.

Installer is the subject. *Carpet* is the object of the main part of the sentence (acted on by the installer), and *customer* is the object of the phrase *to the customer*. Nevertheless, both *carpet* and *customer* are objects.

1.1.3 Plural Nouns

Nouns can be either singular or plural. The usual way to make a plural noun is to add *s* or *es* to the singular form of the word:

Singular	Plural
file	files
tax	taxes
cargo	cargoes

Many nouns have other ways of forming the plural. Some plurals involve a change in a vowel (*mouse/mice, goose/geese, woman/women*), the addition of *en* or *ren* (*ox/oxen, child/children*), the change from *y* to *ies* (*city/cities, specialty/specialties*), or the change from *f* to *v* (*knife/knives, half/halves*; some exceptions: *fifes, roofs*). Some words of Latin origin offer a choice of plurals (*phenomena/phenomenons, indexes/indices, appendixes/appendices*). It's always a good idea to consult a dictionary if you are unsure of the correct or preferred plural spelling of a word.

The plurals of compound nouns are usually formed by adding *s* or *es* to the main word of the compound (*fathers-in-law, editors-in-chief, attorneys-at-law*).

Some nouns are the same whether singular or plural (*sheep, deer, moose*). Some nouns are plural in form but singular in use (*ethics, measles*). Some nouns are used in the plural only (*scissors, trousers*).

Letters, numbers, and words used as words are sometimes made plural by adding an apostrophe and an *s* (*A's, Ph.D.'s, I's*). However, if no confusion would be created by leaving off the apostrophe, it is common practice to just add the *s* (*1990s, RFPs, DVDs*).

1.1.4 Possessive Nouns

A noun becomes possessive when it's used to show the ownership of something. Then you add *'s* to the word:

> the man's car the woman's apartment

However, ownership does not need to be legal:

> the secretary's desk the manager's notes

Also, ownership may be nothing more than an automatic association:

> a day's work the job's prestige

An exception to the rule about adding *'s* to make a noun possessive occurs when the word is singular and already

has two "s" sounds at the end. In cases like the following, an apostrophe is all that's needed:

crisis' dimensions	Mr. Moses' application

When the noun has only one "s" sound at the end, however, retain the *'s*:

Chris's book	Carolyn Nuss's office

With compound (hyphenated) nouns, add *'s* to the last word:

Compound Noun	**Possessive Noun**
mother-in-law	mother-in-law's
mayor-elect	mayor-elect's

To form the possessive of plural nouns, just begin by following the same rule as with singular nouns: add *'s*. However, if the plural noun already ends in an *s* (as most do), drop the one you've added, leaving only the apostrophe:

the clients' complaints	employees' benefits

To denote joint possession by two or more proper nouns, add the *'s* to the last name only (*Moody*, *Nation*, *and Smith's* ad agency). To denote individual possession by two or more persons, add an *'s* to each proper noun (*Moody's*, *Nation's*, and *Smith's* ad agencies).

1.1.5 Collective Nouns

Collective nouns encompass a group of people or objects: *crowd*, *jury*, *committee*, *team*, *audience*, *family*, *couple*, *herd*, *class*. They are often treated as singular nouns. (For more on collective nouns, see Section 1.3.4, Subject–Verb Agreement.)

1.2 PRONOUNS

A **pronoun** is a word that stands for a noun; it saves repeating the noun:

> Employees have some choice of weeks for vacation, but *they* must notify the HR office of *their* preference by March 1.

The pronouns *they* and *their* stand in for the noun *employees*. The noun that a pronoun stands for is called the **antecedent** of the pronoun; *employees* is the antecedent of *they* and *their*.

When the antecedent is plural, the pronoun that stands in for it has to be plural; *they* and *their* are plural pronouns because *employees* is plural. Likewise, when the antecedent is singular, the pronoun has to be singular:

> We thought the contract had expired, but we soon learned that *it* had not.

However, you should be aware that expectations are changing regarding the use of *they* (and its variants *their*, *them*, and *themselves*) as singular pronouns, and these evolving expectations will be a source of uncertainty for some time to come. The problem stems from the fact that English does not have a gender-neutral singular pronoun to refer to people. In the past, many writers defaulted to *he* and its variants in order to be grammatically correct, even though doing so created situations in which the language was sexist. The solutions of using *he or she* or switching back and forth between *he* and *she* in a document can be awkward, particularly in paragraphs that require multiple pronouns based on the same antecedent.

In response to this need for a gender-neutral pronoun, many linguists and some style guides now consider it grammatically acceptable to use *they* and *their* to refer to a singular noun, as in this sentence:

> Any employee seeking a promotion opportunity must check with *their* supervisor first to make sure all performance reviews are up to date.

Using *their* in this case neatly avoids the problems of sexist and awkward language and will probably become even more widely accepted in the coming years. However, some readers still continue to view it as a grammatical error and an instance of careless writing, which creates a dilemma for business communicators.

The simplest solution is often to rewrite sentences in order to make all the affected nouns and pronouns plural:

> *All employees seeking promotion opportunities* must check with *their supervisors* first to make sure all performance reviews are up to date.

If rewriting the sentence isn't feasible, you have to decide whether using *they* or one of its variants will diminish your credibility in the eyes of your readers. Using *he or she* is still perfectly acceptable, although it can feel overly formal in some contexts.

(Note that even as the usage of *they* evolves, the rule of matching singular pronouns with singular nouns and plural pronouns with plural nouns stays intact. The change taking place is that *they* is gradually becoming both a singular and plural term, depending on context, just as *you* can be singular or plural.)

1.2.1 Multiple Antecedents

Sometimes a pronoun has a double (or even a triple) antecedent:

> Kathryn Boettcher and Luis Gutierrez went beyond their sales quotas for January.

If taken alone, *Kathryn Boettcher* is a singular antecedent. So is *Luis Gutierrez*. However, when together they are the

plural antecedent of a pronoun, so the pronoun has to be plural. Thus the pronoun is *their* instead of *her* or *his*.

1.2.2 Unclear Antecedents

In some sentences, the pronoun's antecedent is unclear:

> Sandy Wright sent Jane Brougham *her* production figures for the previous year. *She* thought they were too low.

To which person does the pronoun *her* refer? Someone who knew Sandy and Jane and knew their business relationship might be able to figure out the antecedent for *her*. Even with such an advantage, however, a reader might receive the wrong meaning. Also, it would be nearly impossible for any reader to know which name is the antecedent of *she*.

The best way to clarify an ambiguous pronoun is usually to rewrite the sentence, repeating nouns when needed for clarity:

> Sandy Wright sent her production figures for the previous year to Jane Brougham. Jane thought they were too low.

The noun needs to be repeated only when the antecedent is unclear.

1.2.3 Pronoun Classes

Personal pronouns consist of *I, you, we/us, he/him, she/her, it*, and *they/them*.

Compound personal pronouns are created by adding *self* or *selves* to simple personal pronouns: *myself, ourselves, yourself, yourselves, himself, herself, itself, themselves*. Compound personal pronouns are used either *intensively*, to emphasize the identity of the noun or pronoun (I *myself* have seen the demonstration), or *reflexively*, to indicate that the subject is the receiver of his or her own action (I promised *myself* I'd finish by noon). Compound personal pronouns are used incorrectly if they appear in a sentence without their antecedent:

> Walter, Virginia, and *I* (not *myself*) are the top salespeople.
>
> You need to tell *her* (not *herself*) about the mixup.

Relative pronouns refer to nouns (or groups of words used as nouns) in the main clause and are used to introduce clauses:

> Purina is the brand *that* most dog owners purchase.

The relative pronouns are *which, who, whom, whose*, and *what*. Other words used as relative pronouns include *that, whoever, whomever, whatever*, and *whichever*.

Interrogative pronouns are those used for asking questions: *who, whom, whose, which*, and *what*.

Demonstrative pronouns point out particular persons, places, or things:

> *That* is my desk. *This* can't be correct.

The demonstrative pronouns are *this, these, that*, and *those*.

Indefinite pronouns refer to persons or things not specifically identified. They include *anyone, someone, everyone, everybody, somebody, either, neither, one, none, all, both, each, another, any, many*, and similar words.

1.2.4 Case of Pronouns

The case of a pronoun tells whether it's acting or acted upon:

> *She* sells an average of five packages each week.

In this sentence, *she* is doing the selling. Because *she* is acting, *she* is said to be in the **nominative case**. Now consider what happens when the pronoun is acted upon:

> After six months, Ms. Browning promoted *her.*

In this sentence, the pronoun *her* is acted upon and is thus said to be in the **objective case**.

Contrast the nominative and objective pronouns in this list:

Nominative	Objective
I	me
we	us
he	him
she	her
they	them
who	whom
whoever	whomever

Objective pronouns may be used as either the object of a verb (such as *promoted*) or the object of a preposition (such as *with*):

> Rob worked with *them* until the order was filled.

In this example, *them* is the object of the preposition *with* because Rob acted upon—worked with—them. Here's a sentence with three pronouns, the first one nominative, the second the object of a verb, and the third the object of a preposition:

> *He* paid *us* as soon as the check came from *them.*

He is nominative; *us* is objective because it's the object of the verb *paid; them* is objective because it's the object of the preposition *from*.

Every writer sometimes wonders whether to use *who* or *whom*:

(Who, Whom) will you hire?

Because this sentence is a question, it's difficult to see that *whom* is the object of the verb *hire*. You can figure out which pronoun to use if you rearrange the question and temporarily try *she* and *her* in place of *who* and *whom:* "Will you hire *she?*" or "Will you hire *her?*" *Her* and *whom* are both objective, so the correct choice is "Whom will you hire?" Here's a different example:

(Who, Whom) logged so much travel time?

Turning the question into a statement, you get:

He logged so much travel time.

Therefore, the correct statement is:

Who logged so much travel time?

1.2.5 Possessive Pronouns

Possessive pronouns work like possessive nouns—they show ownership or automatic association:

her job	their preferences
his account	its equipment

However, possessive pronouns are different from possessive nouns in the way they are written. Possessive pronouns never have an apostrophe:

Possessive Noun	Possessive Pronoun
the woman's estate	her estate
Roger Franklin's plans	his plans
the shareholders' feelings	their feelings
the vacuum cleaner's attachments	its attachments

The word *its* is the possessive of *it*. Like all other possessive pronouns, *its* has no apostrophe. Some people confuse *its* with *it's*, the contraction of *it is*. (Contractions are discussed in Section 2.9, Apostrophes.)

1.2.6 Pronoun–Antecedent Agreement

Like nouns, pronouns can be singular or plural. Pronouns must agree in number with their antecedents—a singular antecedent requires a singular pronoun:

The president of the board tendered *his* resignation.

Multiple antecedents require a plural pronoun:

The members of the board tendered *their* resignations.

A pronoun referring to singular antecedents connected by *or* or *nor* should be singular:

Neither Sean nor Terry made his quota.

But a pronoun referring to a plural and a singular antecedent connected by *or* or *nor* should be plural:

Neither Sean nor the twins made *their* quotas.

Formal English prefers the nominative case after the linking verb *to be*:

It is *I*. That is *he*.

However, for general usage it's perfectly acceptable to use the more natural "It's me" and "That's him."

1.3 VERBS

A **verb** describes an action or acts as a link between a subject and words that define or describe that subject:

They all *quit* in disgust.

Working conditions *were* substandard.

The English language is full of **action verbs.** Here are a few you'll often run across in the business world:

verify	perform	fulfill
hire	succeed	send
leave	improve	receive
accept	develop	pay

You could undoubtedly list many more.

The most common **linking verbs** are all the forms of *to be*: I *am*, *was*, or *will be;* you *are, were*, or *will be*. Other words that can serve as linking verbs include *seem*, *become*, *appear*, *prove*, *look*, *remain*, *feel*, *taste*, *smell*, *sound*, *resemble*, *turn*, and *grow*:

It *seemed* a good plan at the time.

She *sounds* impressive at a meeting.

The time *grows* near for us to make a decision.

These verbs link what comes before them in the sentence with what comes after; no action is involved. (See Section 1.7.5 for a fuller discussion of linking verbs.)

An **auxiliary verb** is one that helps another verb and is used for showing tense, voice, and so on. A verb with its helpers is called a **verb phrase**. Verbs used as auxiliaries include *do*, *did*, *have*, *may*, *can*, *must*, *shall*, *might*, *could*, *would*, and *should*.

1.3.1 Verb Tenses

English has three simple verb tenses: present, past, and future.

Present:	Our branches in Hawaii *stock* other items.
Past:	We *stocked* Purquil pens for a short time.
Future:	Rotex Tire Stores *will stock* your line of tires when you begin a program of effective national advertising.

With most verbs (the regular ones), the past tense ends in *ed*, and the future tense always has *will* or *shall* in front of it. But the present tense is more complex, depending on the subject:

	First Person	Second Person	Third Person
Singular	I stock	you stock	he/she/it stocks
Plural	we stock	you stock	they stock

The basic form, *stock*, takes an additional *s* when *he, she*, or *it* precedes it. (See Section 1.3.4 for more on subject–verb agreement.)

In addition to the three simple tenses, the three **perfect tenses** are created by adding forms of the auxiliary verb *have*. The present perfect tense uses the past participle (regularly the past tense) of the main verb, *stocked*, and adds the present-tense *have* or *has* to the front of it:

(I, we, you, they) *have stocked.*

(He, she, it) *has stocked.*

The past perfect tense uses the past participle of the main verb, *stocked*, and adds the past-tense *had* to the front of it:

(I, you, he, she, it, we, they) *had* stocked.

The future perfect tense also uses the past participle of the main verb, *stocked*, but adds the future-tense *will have*:

(I, you, he, she, it, we, they) *will have* stocked.

Verbs should be kept in the same tense when the actions occur at the same time:

When the payroll checks *came in,* everyone *showed up* for work.

We *have found* that everyone *has pitched* in to help.

When the actions occur at different times, you may change tense accordingly:

The shipment *came* last Wednesday, so if another one *comes* in today, please return it.

The new employee *had been* ill at ease, but now she *has become* a full-fledged member of the team.

1.3.2 Irregular Verbs

Many verbs don't follow some of the standard patterns for verb tenses. The most irregular of these verbs is *to be*:

Tense	Singular	Plural
Present:	I *am*	we *are*
	you *are*	you *are*
	he, she, it *is*	they *are*
Past:	I *was*	we *were*
	you *were*	you *were*
	he, she, it *was*	they *were*

The future tense of *to be* is formed in the same way that the future tense of a regular verb is formed.

The perfect tenses of *to be* are also formed as they would be for a regular verb, except that the past participle is a special form, *been*, instead of just the past tense:

Present perfect:	you have been
Past perfect:	you had been
Future perfect:	you will have been

Here's a sampling of other irregular verbs:

Present	Past	Past Participle
begin	began	begun
shrink	shrank	shrunk
know	knew	known
rise	rose	risen
become	became	become
go	went	gone
do	did	done

Dictionaries list the various forms of other irregular verbs.

1.3.3 Transitive and Intransitive Verbs

Many people are confused by three particular sets of verbs:

lie/lay	sit/set	rise/raise

Using these verbs correctly is much easier when you learn the difference between transitive and intransitive verbs.

Transitive verbs require a receiver; they "transfer" their action to an object. **Intransitive verbs** do not have a receiver for their action. Some intransitive verbs are complete in themselves and need no help from other words (prices *dropped*; we *won*). Other intransitive words must be "completed" by a noun or adjective called a **complement**. Complements occur with linking verbs.

Here are some sample uses of transitive and intransitive verbs:

Intransitive	Transitive
We should include in our new offices a place to *lie* down for a nap.	The workers will be here on Monday to *lay* new carpeting.
Even the way an interviewee *sits* is important.	That crate is full of stemware, so *set* it down carefully.
Salaries at Compu-Link, Inc., *rise* swiftly.	They *raise* their level of production every year.

The workers *lay* carpeting, you *set down* the crate, they *raise* production; each action is transferred to something. In the intransitive sentences, a person *lies down*, an interviewee *sits*, and salaries *rise* without affecting anything else. Intransitive sentences are complete with only a subject and a verb; transitive sentences are not complete unless they also include an object or something to transfer the action to.

Tenses are a confusing element of the *lie*/*lay* problem:

Present	Past	Past Participle
I *lie*	I *lay*	I *have lain*
I *lay* (something down)	I *laid* (something down)	I *have laid* (something down)

The past tense of *lie* and the present tense of *lay* look and sound alike, even though they're different verbs.

1.3.4 Subject–Verb Agreement

Whether regular or irregular, every verb must agree with its subject, both in person (first, second, or third) and in number (singular or plural).

	First Person	Second Person	Third Person
Singular	I *am*	you *are*	he/she/it *is*
	I *write*	you *write*	he/she/it *writes*
Plural	we *are*	you *are*	they *are*
	we *write*	you *write*	they *write*

In a simple sentence, making a verb agree with its subject is a straightforward task:

Hector Ruiz *is* a strong competitor. (third-person singular)

We *write* to you every month. (first-person plural)

Confusion sometimes arises when sentences are a bit more complicated. For example, be sure to avoid agreement problems when words come between the subject and verb. In the following examples, the verb appears in italics, and its subject is underlined:

The analysis of existing documents *takes* a full week.

Even though *documents* is a plural, the verb is in the singular form. That's because the subject of the sentence is *analysis*, a singular noun. The phrase *of existing documents* can be disregarded. Here is another example:

The answers for this exercise *are* in the study guide.

Take away the phrase *for this exercise* and you are left with the plural subject *answers*. Therefore, the verb takes the plural form.

Verb agreement is also complicated when the subject is a collective noun or pronoun or when the subject may be considered either singular or plural. In such cases, you often have to analyze the surrounding sentence to determine which verb form to use:

The staff *is* quartered in the warehouse.

The staff *are* at their desks in the warehouse.

The computers and the staff *are* in the warehouse.

Neither the staff nor the computers *are* in the warehouse.

Every computer *is* in the warehouse.

Many a computer *is* in the warehouse.

Did you notice that words such as *every* use the singular verb form? In addition, when an *either*/*or* or a *neither*/*nor* phrase combines singular and plural nouns, the verb takes the form that matches the noun closest to it.

In the business world, some subjects require extra attention. Company names, for example, are considered singular and therefore take a singular verb in most cases—even if they contain plural words:

> Stater Brothers *offers* convenient grocery shopping.

In addition, quantities are sometimes considered singular and sometimes plural. If a quantity refers to a total amount, it takes a singular verb; if a quantity refers to individual, countable units, it takes a plural verb:

> Three hours *is* a long time.
>
> The eight dollars we collected for the fund are tacked on the bulletin board.

Fractions may also be singular or plural, depending on the noun that accompanies them:

> One-third of the warehouse *is* devoted to this product line.
>
> One-third of the products *are* defective.

To decide whether to use a singular or plural verb with subjects such as *number* and *variety*, follow this simple rule: If the subject is preceded by *a*, use a plural verb:

> *A* number of products *are* being displayed at the trade show.

If the subject is preceded by *the*, use a singular verb:

> *The* variety of products on display *is* mind-boggling.

For a related discussion, see Section 1.7.1, Longer Sentences.

1.3.5 Voice of Verbs

Verbs have two voices, active and passive. When the subject comes first, the verb is in **active voice**; when the object comes first, the verb is in **passive voice**:

> **Active:** The buyer *paid* a large amount.
>
> **Passive:** A large amount *was paid* by the buyer.

The passive voice uses a form of the verb *to be*, which adds words to a sentence. In the example, the passive-voice sentence uses eight words, whereas the active-voice sentence uses only six to say the same thing. The words *was* and *by* are unnecessary to convey the meaning of the sentence. In fact, extra words usually clog meaning. So be sure to opt for the active voice when you have a choice.

At times, however, you have no choice:

> Several items *have been taken*, but so far we don't know who took them.

The passive voice becomes necessary when you don't know (or don't want to say) who performed the action; the active voice is bolder and more direct.

1.3.6 Mood of Verbs

Verbs can express one of three moods: indicative, imperative, or subjunctive. The indicative mood is used to make a statement or to ask a question:

> The secretary mailed a letter to each supplier.
>
> Did the secretary mail a letter to each supplier?

Use the imperative mood when you wish to command or request:

> Please mail a letter to each supplier.

With the imperative mood, the subject is the understood *you*.

The subjunctive mood is used to express doubt or a wish or a condition contrary to fact:

> If I *were* you, I wouldn't send that email.

The subjunctive is also used to express a suggestion or a request:

> I asked that Rosario *be* [not *is*] present at the meeting.

1.3.7 Verbals

Verbals are verbs that are modified to function as other parts of speech. They include infinitives, gerunds, and participles.

Infinitives are formed by placing a *to* in front of the verb (*to go, to purchase, to work*). They function as nouns. Although many of us were taught that it is incorrect to split an infinitive—that is, to place an adverb between the *to* and the verb—this "rule" never had much logical linguistic basis and is no longer rigidly advocated by many contemporary language experts. In some cases, the adverb is best placed in the middle of the infinitive to avoid awkward constructions or ambiguous meaning:

> Production of steel is expected to *moderately* exceed domestic use.

Gerunds are verbals formed by adding *ing* to a verb (*going, having, working*). Like infinitives, they function as nouns. Gerunds and gerund phrases take a singular verb:

Borrowing from banks is preferable to getting venture capital.

Participles are verb forms used as adjectives. The present participle ends in *ing* and generally describes action going on at the same time as other action:

Checking the schedule, the contractor was pleased with progress on the project.

The **past participle** is usually the same form as the past tense and generally indicates completed action:

When *completed*, the project will occupy six city blocks.

The **perfect participle** is formed by adding *having* to the past participle:

Having completed the project, the contractor submitted his last invoice.

1.4 ADJECTIVES

An **adjective** modifies (tells something about) a noun or pronoun. Each of the following phrases says more about the noun or pronoun than the noun or pronoun would say alone:

an *efficient* staff	a *heavy* price
brisk trade	*light* web traffic

Adjectives modify nouns more often than they modify pronouns. When adjectives do modify pronouns, however, the sentence usually has a linking verb:

They were *attentive*.	It looked *appropriate*.
He seems *interested*.	You are *skillful*.

1.4.1 Types of Adjectives

Adjectives serve a variety of purposes. **Descriptive adjectives** express some quality belonging to the modified item (*tall, successful, green*). **Limiting** or **definitive adjectives**, on the other hand, point out the modified item or limit its meaning without expressing a quality. Types include:

- Numeral adjectives (*one, fifty, second*)
- Articles (*a, an, the*)
- Pronominal adjectives: pronouns used as adjectives (*his* desk, *each* employee)
- Demonstrative adjectives: *this*, *these*, *that*, *those* (*these* tires, *that* invoice)

Proper adjectives are derived from proper nouns:

Chinese customs	*Orwellian* overtones

Predicate adjectives complete the meaning of the predicate and are introduced by linking verbs:

The location is *perfect*.	Prices are *high*.

1.4.2 Comparative Degree

Most adjectives can take three forms: simple, comparative, and superlative. The simple form modifies a single noun or pronoun. Use the comparative form when comparing two items. When comparing three or more items, use the superlative form:

Simple	Comparative	Superlative
hard	harder	hardest
safe	safer	safest
dry	drier	driest

The comparative form adds *er* to the simple form, and the superlative form adds *est*. (The *y* at the end of a word changes to *i* before the *er* or *est* is added.)

A small number of adjectives are irregular, including these:

Simple	Comparative	Superlative
good	better	best
bad	worse	worst
little	less	least

When the simple form of an adjective has two or more syllables, you usually add *more* to form the comparative and *most* to form the superlative:

Simple	Comparative	Superlative
useful	more useful	most useful
exhausting	more exhausting	most exhausting
expensive	more expensive	most expensive

The most common exceptions are two-syllable adjectives that end in *y:*

Simple	Comparative	Superlative
happy	happier	happiest
costly	costlier	costliest

If you choose this option, change the *y* to *i* and tack *er* or *est* onto the end. (Note that when *more*, *most*, or any other adjective is used to modify another adjective, it becomes an adverb. See 1.5.2, Adverb–Adjective Confusion.)

Some adjectives cannot be used to make comparisons because they themselves indicate the extreme. For example, if something is perfect, nothing can be more perfect. If something is unique or ultimate, nothing can be more unique or more ultimate.

1.4.3 Hyphenated Adjectives

Many adjectives used in the business world are actually combinations of words: *up-to-date* report, *last-minute* effort, *fifth-floor* suite, *well-built* engine. As you can see, they are hyphenated when they come before the noun they modify. However, when such word combinations come after the noun they modify, they are not hyphenated. In the following example, the adjectives appear in italics and the nouns they modify are underlined:

> The report is *up to date* because of our team's *last-minute* efforts.

Hyphens are not used when part of the combination is a word ending in *ly* (because that word is usually not an adjective). Hyphens are also omitted from word combinations that are used so frequently that readers are used to seeing the words together and are therefore unlikely to misread them without hyphens:

> We live in a *rapidly shrinking* world.
>
> Our *highly motivated* employees will be well paid.
>
> Please consider renewing your *credit card* account.
>
> Our new intern is a *high school* student.

1.5 ADVERBS

An **adverb** modifies a verb, an adjective, or another adverb:

Modifying a verb:	Our marketing department works *efficiently*.
Modifying an adjective:	She was not dependable, although she was *highly* intelligent.
Modifying another adverb:	When signing new clients, he moved *extremely* cautiously.

An adverb can be a single word (*clearly*), a phrase (*very clearly*), or a clause (*because it was clear*).

1.5.1 Types of Adverbs

Simple adverbs are simple modifiers:

> The door opened *automatically.*
>
> The order arrived *yesterday.*
>
> Top companies were *there.*

Interrogative adverbs ask a question:

> *Where* have you been?

Conjunctive adverbs connect clauses:

> The boardroom isn't available for the meeting; *however*, the conference room should be clear.
>
> We met all our sales goals for April; *therefore*, all sales reps will get a bonus.

Words frequently used as conjunctive adverbs include *however*, *nevertheless*, *therefore*, *similarly*, *thus*, and *meanwhile*.

Negative adverbs include *not*, *never*, *seldom*, *rarely*, *scarcely*, *hardly*, and similar words. Negative adverbs are powerful words and therefore do not need any help in conveying a negative thought. Avoid using double negatives like these:

> I don't want no mistakes.
> (Correct: "I don't want any mistakes," or "I want no mistakes.")
>
> They couldn't hardly read the report.
> (Correct: "They could hardly read the report," or "They couldn't read the report.")
>
> They scarcely noticed neither one.
> (Correct: "They scarcely noticed either one," or "They noticed neither one.")

1.5.2 Adverb–Adjective Confusion

Many adverbs are adjectives turned into adverbs by adding *ly*: *highly*, *extremely*, *officially*, *closely*, *really*. In addition, many words can be adjectives or adverbs with no change in spelling, depending on their usage in a particular sentence:

The *early* bird gets the worm. [adjective]	We arrived *early*. [adverb]
It was a *hard* decision. [adjective]	He hit the wall *hard*. [adverb]
I enjoy *most* forms of jazz. [adjective]	My finances are my *most* important problem. [adverb]

Because of this situation, some adverbs are difficult to distinguish from adjectives. For example, in the following sentences, is the underlined word an adverb or an adjective?

> They worked well.
>
> The baby is well.

In the first sentence, *well* is an adverb modifying the verb *worked*. In the second sentence, *well* is an adjective modifying the noun *baby*. You may find it helpful to remember that a *linking verb* (such as *is* in "The baby is well") connects an adjective to the noun it modifies. In contrast, an *action verb* is modified by an adverb:

Adjective	Adverb
He is a *good* worker. (What kind of worker is he?)	He works *well*. (How does he work?)
It is a *real* computer. (What kind of computer is it?)	It *really* is a computer. (To what extent is it a computer?)
The traffic is *slow*. (What quality does the traffic have?)	The traffic moves *slowly*. (How does the traffic move?)
This food tastes *bad* without salt. (What quality does the food have?)	This food *badly* needs salt. (How much is it needed?)

1.5.3 Comparative Degree

Like adjectives, adverbs can be used to compare items. Generally, the basic adverb is combined with *more* or *most*, just as long adjectives are. However, some adverbs have one-word comparative forms:

One Item	Two Items	Three Items
quickly	more quickly	most quickly
sincerely	less sincerely	least sincerely
fast	faster	fastest
well	better	best

1.6 OTHER PARTS OF SPEECH

Nouns, pronouns, verbs, adjectives, and adverbs carry most of the meaning in a sentence. Four other parts of speech link them together in sentences: prepositions, conjunctions, articles, and interjections.

1.6.1 Prepositions

A preposition is a word or group of words that describes a relationship between other words in a sentence. A simple preposition is made up of one word: *of*, *in*, *by*, *above*, *below*. A *compound preposition* is made up of two prepositions: *out of*, *from among*, *except for*, *because of*.

A **prepositional phrase** is a group of words introduced by a preposition that functions as an adjective (an adjectival phrase) or as an adverb (adverbial phrase) by telling more about a pronoun, noun, or verb:

The shipment will be here *by next Friday*.

Put the mail *in the out-bin*.

Prepositional phrases should be placed as close as possible to the element they are modifying:

Shopping *on the internet* can be confusing for the uninitiated. (not Shopping can be confusing for the uninitiated *on the internet*.)

Some prepositions are closely linked with a verb. When using phrases such as *look up* and *wipe out*, keep them intact and do not insert anything between the verb and the preposition.

You may have been told that it is unacceptable to put a preposition at the end of a sentence. However, that is not a hard-and-fast rule, and trying to follow it can sometimes be a challenge. You can end a sentence with a preposition as long as the sentence sounds natural and as long as rewording the sentence would create awkward wording:

I couldn't tell what they were interested in.

What did she attribute it to?

What are you looking for?

Avoid using unnecessary prepositions. In the following examples, the prepositions in parentheses should be omitted:

All (of) the staff members were present.

I almost fell off (of) my chair with surprise.

Where was Mr. Steuben going (to)?

They couldn't help (from) wondering.

The opposite problem is failing to include a preposition when you should. Consider these two sentences:

Sales were over $100,000 for Linda and Bill.

Sales were over $100,000 for Linda and for Bill.

The first sentence indicates that Linda and Bill had combined sales over $100,000; the second, that Linda and Bill each had sales over $100,000, for a combined total in excess of $200,000. The preposition *for* is critical here.

When the same preposition can be used for two or more words in a sentence without affecting the meaning, only the last preposition is required:

We are familiar (with) and satisfied with your company's products.

But when different prepositions are normally used with the words, all the prepositions must be included:

> We are familiar with and interested in your company's products.

Some prepositions have come to be used in a particular way with certain other parts of speech. Here is a partial list of some prepositions that have come to be used with certain words:

according to	independent of
agree to (a proposal)	inferior to
agree with (a person)	plan to
buy from	prefer to
capable of	prior to
comply with	reason with
conform to	responsible for
differ from (things)	similar to
differ with (person)	talk to (without interaction)
different from	talk with (with interaction)
get from (receive)	wait for (person or thing)
get off (dismount)	wait on (like a waiter)

If you are unsure of the correct idiomatic expression, check a dictionary.

Some verb–preposition idioms vary depending on the situation: You agree *to* a proposal but *with* a person, *on* a price, or *in* principle. You argue *about* something, *with* a person, and *for* or *against* a proposition. You compare one item *to* another to show their similarities; you compare one item *with* another to show differences.

Here are some other examples of preposition usage that have given writers trouble:

among/between: *Among* is used to refer to three or more (Circulate the memo *among* the staff); *between* is used to refer to two (Put the copy machine *between* Judy and Dan).

as if/like: *As if* is used before a clause (It seems *as if* we should be doing something); *like* is used before a noun or pronoun (He seems *like* a nice guy).

have/of: *Have* is a verb used in verb phrases (They should *have* checked first); *of* is a preposition and is never used in such cases.

in/into: *In* is used to refer to a static position (The file is *in* the cabinet); *into* is used to refer to movement toward a position (Put the file *into* the cabinet).

1.6.2 Conjunctions

Conjunctions connect the parts of a sentence: words, phrases, and clauses. A **coordinating conjunction** connects two words, phrases, or clauses of equal rank. The simple coordinating conjunctions include *and*, *but*, *or*, *nor*, *for*, *yet*, and *so*. **Correlative conjunctions** are coordinating conjunctions used in pairs: *both*/*and*, *either*/*or*, *neither*/*nor*, *not only*/*but also*. Constructions with correlative conjunctions should be parallel, with the same part of speech following each element of the conjunction:

> The purchase was *not only* expensive *but also* unnecessary.
>
> The purchase *not only was* expensive *but also was* unnecessary.

Conjunctive adverbs are adverbs used to connect or show relationships between clauses. They include *however*, *nevertheless*, *consequently*, *moreover*, and *as a result*.

A **subordinate conjunction** connects two clauses of unequal rank; it joins a dependent (subordinate) clause to the independent clause on which it depends (for more on dependent and independent clauses, see Section 1.7.1). Subordinate conjunctions include *as*, *if*, *because*, *although*, *while*, *before*, *since*, *that*, *until*, *unless*, *when*, *where*, and *whether*.

1.6.3 Articles and Interjections

Only three articles exist in English: *the*, *a*, and *an*. These words are used, like adjectives, to specify which item you are talking about. *The* is called the *definite article* because it indicates a specific noun; *a* and *an* are called the *indefinite articles* because they are less specific about what they are referring to.

If a word begins with a vowel (soft) sound, use *an;* otherwise, use *a*. It's *a history*, not *an history*, *a hypothesis*, not *an hypothesis*. Use *an* with an "h" word only if it is a soft "h," as in *honor* and *hour*. Use *an* with words that are pronounced with a soft vowel sound even if they are spelled beginning with a consonant (usually in the case of abbreviations): *an SEC application, an MP3 file*. Use *a* with words that begin with vowels if they are pronounced with a hard sound: *a university, a Usenet account*.

Repeat an article if adjectives modify different nouns: *The red house and the white house are mine*. Do not repeat an article if all adjectives modify the same noun: *The red and white house is mine*.

Interjections are words that express no solid information, only emotion:

Wow!	Well, well!
Oh, no!	Good!

Such purely emotional language has its place in private life and advertising copy, but it only weakens the effect of most business writing.

1.7 SENTENCES

Sentences are constructed with the major building blocks, the parts of speech. Take, for example, this simple two-word sentence:

> Money talks.

It consists of a noun (*money*) and a verb (*talks*). When used in this way, the noun works as the first requirement for a sentence, the subject, and the verb works as the second requirement, the predicate. Without a subject (who or what does something) and a predicate (the doing of it), you have merely a collection of words, not a sentence.

1.7.1 Longer Sentences

No matter how long a sentence is, its foundation is still a subject and a predicate verb. In the following examples, the subject is underlined once, the predicate verb twice:

> Marex and Contron enjoy higher earnings each quarter.

Marex [and] *Contron* do something; *enjoy* is what they do.

> My interview, coming minutes after my freeway accident, did not impress or move anyone.

Interview is what did something. What did it do? It *did* [not] *impress* [or] *move*.

> In terms of usable space, a steel warehouse, with its extremely long span of roof unsupported by pillars, makes more sense.

Warehouse is what *makes*.

These three sentences demonstrate several things. First, in all three sentences, the subject and predicate verb are the "bare bones" of the sentence, the parts that carry the core idea of the sentence. When trying to find the subject and predicate verb, disregard all prepositional phrases, modifiers, conjunctions, and articles.

Second, in the third sentence, the verb is singular (*makes*) because the subject is singular (*warehouse*). Even though the plural noun *pillars* is closer to the verb, *warehouse* is the subject. So *warehouse* determines whether the verb is singular or plural. Subject and predicate must agree.

Third, the subject in the first sentence is compound (*Marex* [and] *Contron*). A compound subject, when connected by *and*, requires a plural verb (*enjoy*). Also, the second sentence shows how compound predicates can occur (*did* [not] *impress* [or] *move*).

Fourth, the second sentence incorporates a group of words—*coming minutes after my freeway accident*—containing a form of a verb (*coming*) and a noun (*accident*). Yet, this group of words is not a complete sentence for two reasons:

- **Not all nouns are subjects:** *Accident* is not the subject of *coming*.
- **Not all verbs are predicates:**A verb that ends in *ing* can never be the predicate of a sentence (unless preceded by a form of *to be*, as in *was coming*).

Because they don't contain a subject and a predicate, the words *coming minutes after my freeway accident* (called a **phrase**) can't be written as a sentence. That is, the phrase cannot stand alone; it cannot begin with a capital letter and end with a period. So a phrase must always be just one part of a sentence.

Sometimes a sentence incorporates two or more groups of words that do contain a subject and a predicate; these word groups are called **clauses:**

> My *interview*, because it came minutes after my freeway accident, did not impress or move anyone.

The **independent clause** is the portion of the sentence that could stand alone without revision:

> My *interview* did not impress or move anyone.

The other part of the sentence could stand alone only by removing *because*:

> (because) *It* came minutes after my freeway accident.

This part of the sentence is known as a **dependent clause**; although it has a subject and a predicate (just as an independent clause does), it's linked to the main part of the sentence by a word (*because*) showing its dependence.

In summary, the two types of clauses—dependent and independent—both have a subject and a predicate. Dependent clauses, however, do not bear the main meaning of the sentence and are therefore linked to an independent clause. Nor can phrases stand alone because they lack both a subject and a predicate. Only independent clauses can be written as sentences without revision.

1.7.2 Types of Sentences

Sentences come in four main types, depending on the extent to which they contain clauses. A **simple sentence** has one subject and one predicate; in short, it has one main independent clause:

> Boeing is the world's largest aerospace company.

A **compound sentence** consists of two independent clauses connected by a coordinating conjunction (*and, or, but*, etc.) or a semicolon:

> Airbus outsold Boeing for several years, but Boeing has recently regained the lead.

A **complex sentence** consists of an independent clause and one or more dependent clauses:

> Boeing is betting [independent clause] that airlines will begin using moderately smaller planes to fly passengers between smaller cities [dependent clause introduced by *that].*

A **compound-complex sentence** has two main clauses, at least one of which contains a subordinate (dependent clause):

> Boeing is betting [independent clause] that airlines will begin using moderately smaller planes to fly passengers between smaller cities [dependent clause], and it anticipates that new airports will be developed to meet passenger needs [independent clause].

1.7.3 Sentence Fragments

An incomplete sentence (a phrase or a dependent clause) that is written as though it were a complete sentence is called a **fragment**. Consider the following sentence fragments:

> Marilyn Sanders, having had pilferage problems in her store for the past year. Refuses to accept the results of our investigation.

This serious error can easily be corrected by putting the two fragments together:

> Marilyn Sanders, having had pilferage problems in her store for the past year, refuses to accept the results of our investigation.

The actual details of a situation will determine the best way for you to remedy a fragment problem.

The ban on fragments has one exception. Some advertising copy contains sentence fragments, written knowingly to convey a certain rhythm. However, advertising is the only area of business in which fragments are acceptable.

1.7.4 Fused Sentences and Comma Splices

Just as there can be too little in a group of words to make it a sentence, there can also be too much:

> All our mail is run through a postage meter every afternoon someone picks it up.

This example contains two sentences, not one, but the two have been blended so that it's hard to tell where one ends and the next begins. Is the mail run through a meter every afternoon? If so, the sentences should read:

> All our mail is run through a postage meter every afternoon. Someone picks it up.

Perhaps the mail is run through a meter at some other time (morning, for example) and is picked up every afternoon:

> All our mail is run through a postage meter. Every afternoon someone picks it up.

The order of words is the same in all three cases; sentence division makes all the difference. Either of the last two cases is grammatically correct. The choice depends on the facts of the situation.

Sometimes these so-called **fused sentences** have a more obvious point of separation:

> Several large orders arrived within a few days of one another, too many came in for us to process by the end of the month.

Here, the comma has been put between two independent clauses in an attempt to link them. When a lowly comma separates two complete sentences, the result is called a **comma splice.** A comma splice can be remedied in one of three ways:

- **Replace the comma with a period and capitalize the next word:**" . . . one another. Too many . . . "
- **Replace the comma with a semicolon and do not capitalize the next word:**" . . . one another; too many . . . " This remedy works only when the two sentences have closely related meanings.
- **Change one of the sentences so that it becomes a phrase or a dependent clause.**This remedy often produces the best writing, but it takes more work.

The third alternative can be carried out in several ways. One is to begin the sentence with a subordinating conjunction:

> Whenever several large orders arrived within a few days of one another, too many came in for us to process by the end of the month.

Another way is to remove part of the subject or the predicate verb from one of the independent clauses, thereby creating a phrase:

> Several large orders arrived within a few days of one another, too many for us to process by the end of the month.

Finally, you can change one of the predicate verbs to its *ing* form:

> Several large orders arrived within a few days of one another, too many coming in for us to process by the end of the month.

In many cases, simply adding a coordinating conjunction can separate fused sentences or remedy a comma splice:

> You can fire them, or you can make better use of their abilities.
>
> Margaret drew up the designs, and Matt carried them out.
>
> We will have three strong months, but after that, sales will taper off.

Be careful with coordinating conjunctions: Use them only to join simple sentences that express similar ideas.

Also, because they say relatively little about the relationship between the two clauses they join, avoid using coordinating conjunctions too often: *and* is merely an addition sign; *but* is just a turn signal; *or* only points to an alternative. Subordinating conjunctions such as *because* and *whenever* tell the reader a lot more.

1.7.5 Sentences with Linking Verbs

Linking verbs were discussed briefly in the section on verbs (Section 1.3). Here, you can see more fully the way they function in a sentence. The following is a model of any sentence with a linking verb:

> A *(verb)* B.

Although words such as *seems* and *feels* can also be linking verbs, let's assume that the verb is a form of *to be*:

> A *is* B.

In such a sentence, A and B are always nouns, pronouns, or adjectives. When one is a noun and the other is a pronoun, or when both are nouns, the sentence says that one is the same as the other:

> She is president.
>
> Rachel is president.
>
> She is forceful.

Recall from Section 1.3.3 that the noun or adjective that follows the linking verb is called a *complement*. When it is a noun or noun phrase, the complement is called a *predicate nominative*; when the complement is an adjective, it is referred to as a *predicate adjective*.

1.7.6 Misplaced Modifiers

The position of a modifier in a sentence is important. The movement of *only* changes the meaning in the following sentences:

> Only we are obliged to supply those items specified in your contract.
>
> We are obliged only to supply those items specified in your contract.
>
> We are obliged to supply only those items specified in your contract.
>
> We are obliged to supply those items specified only in your contract.

In any particular set of circumstances, only one of those sentences would be accurate. The others would very likely cause problems. To prevent misunderstanding, place such modifiers as close as possible to the noun or verb they modify.

For similar reasons, whole phrases that are modifiers must be placed near the right noun or verb. Mistakes in placement create ludicrous meanings:

> Antia Information Systems bought new computer chairs for the programmers with more comfortable seats.

The anatomy of programmers is not normally a concern of business writers. Obviously, the comfort of the chairs was the issue:

> Antia Information Systems bought programmers the new computer chairs with more comfortable seats.

Here is another example:

> I asked him to file all the letters in the cabinet that had been answered.

In this ridiculous sentence, the cabinet has been answered, even though no cabinet in history is known to have asked a question. *That had been answered* is too far from *letters* and too close to *cabinet*. Here's an improvement:

> I asked him to file in the cabinet all the letters that had been answered.

The term **dangling modifier** is often used to refer to a clause or phrase that because of its position in the sentence seems to modify a word that it is not meant to modify. For instance:

> Lying motionless, coworkers rushed to Barry's aid.

Readers expect an introductory phrase to modify the subject of the main clause. But in this case it wasn't the *coworkers* who were lying motionless but rather *Barry* who was in this situation. Like this example, most instances of dangling modifiers occur at the beginning of sentences. The source of some danglers is a passive construction:

> To find the needed information, the whole book had to be read.

In such cases, switching to the active voice can usually remedy the problem:

> To find the needed information, you will need to read the whole book.

1.7.7 Parallelism

Two or more sentence elements that have the same relation to another element should be in the same form. Otherwise, the reader is forced to work harder to understand the meaning of the sentence. When a series consists of phrases or clauses, the same part of speech (preposition, gerund, etc.) should introduce them. Do not mix infinitives with participles or adjectives with nouns. Here are some examples of nonparallel elements:

> Andersen is hiring managers, programmers, and people who work in accounting. [nouns not parallel]
>
> Andersen earns income by auditing, consulting, and by bookkeeping. [prepositional phrases not parallel]
>
> Andersen's goals are to win new clients, keeping old clients happy, and finding new enterprises. [infinitive mixed with gerunds]

2.0 Punctuation

On the highway, signs tell you when to slow down or stop, where to turn, and when to merge. In similar fashion, punctuation helps readers negotiate your prose. The proper use of punctuation keeps readers from losing track of your meaning.

2.1 PERIODS

Use a period (1) to end any sentence that is not a question, (2) with certain abbreviations, and (3) as a decimal with numbers (for example, between dollars and cents in an amount of money).

2.2 QUESTION MARKS

Use a question mark after any direct question that requests an answer:

> Are you planning to enclose a check, or shall we bill you?

Don't use a question mark with commands phrased as questions for the sake of politeness:

> Will you send us a check today.

A question mark should precede quotation marks, parentheses, and brackets if it is part of the quoted or parenthetical material; otherwise, it should follow:

> This issue of *Inc*. has an article titled "What's Your Entrepreneurial IQ?"
>
> Have you read the article "Five Principles of Guerrilla Marketing"?

Do not use the question mark with indirect questions or with requests:

> Mr. Antonelli asked whether anyone had seen Nathalia lately.

Do not use a comma or a period with a question mark; the question mark takes the place of these punctuation marks.

2.3 EXCLAMATION POINTS

Use exclamation points after highly emotional language. Because business writing almost never calls for emotional language, you will seldom use exclamation points.

2.4 SEMICOLONS

Semicolons have three main uses. One is to separate two closely related independent clauses:

> The outline for the report is due within a week; the report itself is due at the end of the month.

A semicolon should also be used instead of a comma when the items in a series have commas within them:

> Our previous meetings were on November 11, 2019; February 20, 2020; and April 27, 2021.

Finally, a semicolon should be used to separate independent clauses when the second one begins with a conjunctive adverb such as *however*, *therefore*, or *nevertheless* or a phrase such as *for example* or *in that case*:

> Our supplier has been out of part D712 for 10 weeks; however, we have found another source that can ship the part right away.
>
> His test scores were quite low; on the other hand, he has a lot of relevant experience.

Section 4.4 provides more information on using transitional words and phrases.

Semicolons should always be placed outside parentheses:

> Events Northwest has the contract for this year's convention (August 23–28); we haven't awarded the contract for next year yet.

2.5 COLONS

Use a colon after the salutation in a business letter. You should also use a colon at the end of a sentence or phrase introducing a list or (sometimes) a quotation:

> Our study included the three most critical problems: insufficient capital, incompetent management, and inappropriate location.

A colon should not be used when the list, quotation, or idea is a direct object of the verb or preposition. This rule applies whether the list is set off or run in:

> We are able to supply
> staples
> wood screws
> nails
> toggle bolts
>
> This shipment includes 9 DVDs, 12 CDs, and 4 USB flash drives.

Another way you can use a colon is to separate the main clause and another sentence element when the second explains, illustrates, or amplifies the first:

> Management was unprepared for the union representatives' demands: this fact alone accounts for their arguing well into the night.

However, in contemporary usage, such clauses are frequently separated by a semicolon.

Like semicolons, colons should always be placed outside parentheses:

> He has an expensive list of new demands (none of which is covered in the purchase agreement): new carpeting, network cabling, and a new security system.

2.6 COMMAS

Commas have many uses; the most common is to separate items in a series:

> He took the job, learned it well, worked hard, and succeeded.
>
> Put paper, pencils, and paper clips on the requisition list.

Company style may dictate omitting the final comma in a series. However, if you have a choice, use the final comma; it's often necessary to prevent misunderstanding.

A second place to use a comma is between independent clauses that are joined by a coordinating conjunction (*and*, *but*, or *or*):

> She spoke to the sales staff, and he spoke to the production staff.
>
> I was advised to proceed, and I did.

A third use for the comma is to separate a dependent clause at the beginning of a sentence from an independent clause:

> Because of our lead in the market, we may be able to risk introducing a new product.

However, a dependent clause at the end of a sentence is separated from the independent clause by a comma only when the dependent clause is unnecessary to the main meaning of the sentence:

> We may be able to introduce a new product, although it may involve some risk.

A fourth use for the comma is after an introductory phrase or word:

> Starting with this amount of capital, we can survive in the red for one year.
>
> Through more careful planning, we may be able to serve more people.
>
> Yes, you may proceed as originally planned.

However, with short introductory prepositional phrases and some one-syllable words (such as *hence* and *thus*), the comma is often omitted:

> Before January 1 we must complete the inventory.
>
> Thus we may not need to hire anyone.
>
> In July we will complete the move to Tulsa.

Fifth, paired commas are used to set off nonrestrictive clauses and phrases. A **restrictive clause** is one that cannot

be omitted without altering the meaning of the main clause, whereas a **nonrestrictive clause** can be:

> The *Time* magazine website, which is produced by Steve Conley, has won several design awards. [nonrestrictive: the material set off by commas could be omitted]
>
> The website that is produced by Steve Conley has won several design awards. [restrictive: no commas are used before and after *that is produced by Steve Conley* because this information is necessary to the meaning of the sentence—it specifies which website]

A sixth use for commas is to set off appositive words and phrases. (An **appositive** has the same meaning as the word it is in apposition to.) Like nonrestrictive clauses, appositives can be dropped without changing or obscuring the meaning of the sentence:

> Conley, a freelance designer, also produces the websites for several nonprofit corporations.

Seventh, commas are used between adjectives modifying the same noun (coordinate adjectives):

> She left Monday for a long, difficult recruiting trip.

To test the appropriateness of such a comma, try reversing the order of the adjectives: *a difficult, long recruiting trip*. If the order cannot be reversed, leave out the comma (a *good old friend* isn't the same as an *old good friend*). A comma should not be used when one of the adjectives is part of the noun. Compare these two phrases:

> a distinguished, well-known figure
>
> a distinguished public figure

The adjective–noun combination of *public* and *figure* has been used together so often that it has come to be considered a single thing: *public figure*. So no comma is required.

Eighth, commas are used both before and after the year in sentences that include month, day, and year:

> It will be sent by December 14, 2021, from our Cincinnati plant.

Some companies use the European style: 15 December 2018. No commas should be used in that case. Nor is a comma needed when only the month and year are present (December 2018).

Ninth, commas are used to set off a variety of parenthetical words and phrases within sentences, including state names, dates, abbreviations, transitional expressions, and contrasted elements:

> They were, in fact, prepared to submit a bid.
>
> Habermacher, Inc., went public in 1999.
>
> Our goal was increased profits, not increased market share.
>
> Service, then, is our main concern.
>
> The factory was completed in Chattanooga, Tennessee, just three weeks ago.
>
> Joanne Dubiik, M.D., has applied for a loan from First Savings.
>
> I started work here on March 1, 2003, and soon received my first promotion.

Tenth, a comma is used to separate a quotation from the rest of the sentence:

> Your warranty reads, "These conditions remain in effect for one year from date of purchase."

However, the comma is left out when the quotation as a whole is built into the structure of the sentence:

> He hurried off with an angry "Look where you're going."

Finally, a comma should be used whenever it's needed to avoid confusion or an unintended meaning. Compare the following:

> Ever since they have planned new ventures more carefully.
>
> Ever since, they have planned new ventures more carefully.

2.7 DASHES

Use dashes to surround a comment that is a sudden turn in thought:

> Membership in the IBSA—it's expensive but worth it—may be obtained by applying to our New York office.

A dash can also be used to emphasize a parenthetical word or phrase:

> Third-quarter profits—in excess of $2 million—are up sharply.

Finally, use dashes to set off a phrase that contains commas:

> All our offices—Milwaukee, New Orleans, and Phoenix—have sent representatives.

Don't confuse a dash with a hyphen. A dash separates and emphasizes words, phrases, and clauses more strongly than commas or parentheses can; a hyphen ties two words so tightly that they almost become one word.

When using a computer, use the em dash symbol. When typing a dash in email, type two hyphens with no space before, between, or after.

A second type of dash, the en dash, can be produced with computer word processing and page-layout programs. This kind of dash is shorter than the regular dash and longer than a hyphen. It is reserved almost exclusively for indicating "to" or "through" with numbers such as dates and pages: *2019–2020, pages* 30–44.

2.8 HYPHENS

Hyphens are mainly used in three ways. The first is to separate the parts of compound words beginning with such prefixes as *self-, ex-, quasi-*, and *all-*:

self-assured	quasi-official
ex-wife	all-important

However, do not use hyphens in words that have prefixes such as *pro, anti, non, re, pre, un, inter*, and *extra*:

prolabor	nonunion
antifascist	interdepartmental

Exceptions occur when (1) the prefix occurs before a proper noun or (2) the vowel at the end of the prefix is the same as the first letter of the root word:

pro-Republican	anti-American
anti-inflammatory	extra-atmospheric

When in doubt, consult your dictionary.

Hyphens are used in some types of spelled-out numbers. For instance, they are used to separate the parts of a spelled-out number from *twenty-one* to *ninety-nine* and for spelled-out fractions: *two-thirds, one-sixth* (although some style guides say not to hyphenate fractions used as nouns).

Certain compound nouns are formed by using hyphens: *secretary-treasurer, city-state*. Check your dictionary for compounds you're unsure about.

Hyphens are also used in some compound adjectives, which are adjectives made up of two or more words. Specifically, you should use hyphens in compound adjectives that come before the noun:

> an interest-bearing account well-informed executives

However, you need not hyphenate when the adjective follows a linking verb:

> This account is interest bearing.
>
> Their executives are well informed.

You can shorten sentences that list similar hyphenated words by dropping the common part from all but the last word:

> Check the costs of first-, second-, and third-class postage.

Finally, hyphens may be used to divide words at the end of a typed line. Such hyphenation is best avoided, but when you have to divide words at the end of a line, do so correctly (see Section 3.5). Dictionaries show how words are divided into syllables.

2.9 APOSTROPHES

Use an apostrophe in the possessive form of a noun (but not in a pronoun):

> On his desk was a reply to Bette *Ainsley's* application for the manager's position.

Apostrophes are also used in place of the missing letter(s) of a contraction:

Whole Words	Contraction
we will	we'll
do not	don't
they are	they're

2.10 QUOTATION MARKS

Use quotation marks to surround words that are repeated exactly as they were said or written:

> The collection letter ended by saying, "This is your third and final notice."

Remember: (1) When the quoted material is a complete sentence, the first word is capitalized. (2) The final comma or period goes inside the closing quotation marks.

Quotation marks are also used to set off the title of a newspaper story, magazine article, or book chapter:

> You should read "Legal Aspects of the Collection Letter" in *Today's Credit*.

Quotation marks may also be used to indicate special treatment for words or phrases, such as terms that you're using in an unusual or ironic way:

> Our management "team" spends more time squabbling than working to solve company problems.

When you are defining a word, put the definition in quotation marks:

> The abbreviation *etc.* means "and so forth."

When using quotation marks, take care to insert the closing marks as well as the opening ones.

Although periods and commas go inside any quotation marks, colons and semicolons generally go outside them. A question mark goes inside the quotation marks only if the quotation is a question:

> All that day we wondered, "Is he with us?"

If the quotation is not a question but the entire sentence is, the question mark goes outside:

> What did she mean by "You will hear from me"?

For quotes within quotes, use single quotation marks within double:

> Bonnie Schulman fired up the project team by saying, "We've all heard the doubts that this team can meet the goals outlined in '2020: The Strategic Imperative,' but I have total confidence in your ability and commitment."

Otherwise, do not use single quotation marks for anything, including titles of works—that's British style.

2.11 PARENTHESES AND BRACKETS

Use parentheses to surround comments that are entirely incidental or to supply additional information:

> Our figures do not match yours, although (if my calculations are correct) they are closer than we thought.
>
> Sally Wagner (no relation to our own John Wagner) was just promoted to general manager of the Detroit office.

Parentheses are used in legal documents to surround figures in arabic numerals that follow the same amount in words:

> Remittance will be one thousand two hundred dollars ($1,200).

Be careful to put punctuation marks (period, comma, and so on) outside the parentheses unless they are part of the statement in parentheses. And keep in mind that parentheses have both an opening and a closing mark; both should always be used, even when setting off listed items within text: (*1*), not *1*).

Brackets are used for notation, comment, explanation, or correction within quoted material:

> When asked for a reason, Jackson said, "The dismissal was a carefully considered decision, with input from every member [of the board of directors]."

Brackets are also used for parenthetical material that falls within parentheses:

> Drucker's magnum opus *(Management: Tasks, Responsibilities, Practices* [Harper & Row, 1979]) has influenced generations of entrepreneurs.

2.12 ELLIPSES

Use ellipsis points, or three evenly spaced periods, to indicate that material has been left out of a direct quotation. Use them only in direct quotations and only at the point where material was left out. In the following example, the first sentence is quoted in the second:

> The Dow Jones Industrial Average fell 276.39 points, or 2.6%, during the week to 10,292.31.
>
> According to the *Wall Street Journal*, "The Dow Jones Industrial Average fell 276.39 points . . . to 10,292.31."

The number of dots in ellipses is not optional; always use three. Occasionally, the points of an ellipsis come at the end of a sentence, where they seem to grow a fourth dot. Don't be fooled: One of the dots is a period. Ellipsis points should always be preceded and followed by a space.

Avoid using ellipses to represent a pause in your writing; use a dash for that purpose:

> At first we had planned to leave for the conference on Wednesday—but then we changed our minds. [not *on Wednesday . . . but then*]

3.0 Mechanics

The most obvious and least tolerable mistakes that a business writer makes are probably those related to grammar and punctuation. However, a number of small details, known as writing mechanics, demonstrate the writer's polish and reflect on the company's professionalism.

When it comes to mechanics, also called *style*, many of the "rules" are not hard and fast. Publications and organizations vary in their preferred styles for capitalization, abbreviations, numbers, italics, and so on. Here, we'll try to differentiate between practices that are generally accepted and those that can vary. When you are writing materials for a specific company or organization, find out the preferred style (such as *The Chicago Manual of Style* or *Webster's Style Manual*). Otherwise, choose a respected style guide. The key to style is consistency: If you spell out the word *percent* in one part of a document, don't use the percent sign in a similar context elsewhere in the same document.

3.1 CAPITALIZATION

With capitalization, you can follow either an "up" style (when in doubt, capitalize: *Federal Government, Board of Directors*) or a "down" style (when in doubt, use lowercase: *federal government, board of directors*). The trend over the past few decades has been toward the down style. Your best bet is to get a good style manual and consult it when you have a capitalization question. Following are some rules that most style guides agree on.

Capital letters are used at the beginning of certain word groups:

- Complete sentence: Before hanging up, he said, "We'll meet here on Wednesday at noon."
- Formal statement following a colon: She has a favorite motto: Where there's a will, there's a way.
- Phrase used as sentence: Absolutely not!
- Quoted sentence embedded in another sentence: Scott said, "Nobody was here during lunch hour except me."
- List of items set off from text:

Three preliminary steps are involved:

Design review
Budgeting
Scheduling

Capitalize proper adjectives and proper nouns (the names of particular persons, places, and things):

Darrell Greene lived in a Victorian mansion.

We sent Ms. Larson an application form, informing her that not all applicants are interviewed.

Let's consider opening a branch in the West, perhaps at the west end of Tucson, Arizona.

As office buildings go, the Kinney Building is a pleasant setting for TDG Office Equipment.

We are going to have to cancel our plans for hiring French and German sales reps.

Larson's name is capitalized because she is a particular applicant, whereas the general term *applicant* is left uncapitalized. Likewise, *West* is capitalized when it refers to a particular place but not when it means a direction. In the same way, *office* and *building* are not capitalized when they are general terms (common nouns), but they are capitalized when they are part of the title of a particular office or building (proper nouns). Some proper adjectives are lowercased when they are part of terms that have come into common use, such as *french fries* and *roman numerals*.

Titles within families or companies as well as professional titles may also be capitalized:

I turned down Uncle David when he offered me a job.

I wouldn't be comfortable working for one of my relatives.

We've never had a president quite like President Sweeney.

People's titles are capitalized when they are used in addressing a person, especially in a formal context. They are not usually capitalized, however, when they are used merely to identify the person:

Address the letter to Chairperson Anna Palmer.

I wish to thank Chairperson Anna Palmer for her assistance.

Anna Palmer, chairperson of the board, took the podium.

Also capitalize titles if they are used by themselves in addressing a person:

Thank you, Doctor, for your donation.

Always capitalize the first word of the salutation and complimentary close of a letter:

Dear Mr. Andrews: *Yours* very truly,

The names of organizations are capitalized, of course; so are the official names of their departments and divisions. However, do not use capitals when referring in general terms to a department or division, especially one in another organization:

Route this memo to Personnel.

Larry Tien was transferred to the Microchip Division.

Will you be enrolled in the Psychology Department?

Someone from the personnel department at EnerTech stopped by the booth.

Capitalization is unnecessary when using a word like *company, corporation*, or *university* alone:

> The corporation plans to issue 50,000 shares of common stock.

Likewise, the names of specific products are capitalized, although the names of general product types are not:

> Samsung Galaxy Xerox machine
> Tide laundry detergent

When it comes to government terminology, here are some guides to capitalization: (1) Lowercase *federal* unless it is part of an agency name; (2) capitalize names of courts, departments, bureaus, offices, and agencies but lowercase such references as *the bureau* and *the department* when the full name is not used; (3) lowercase the titles of government officers unless they precede a specific person's name: *the secretary of state, the senator, the ambassador, the governor, and the mayor* but *Mayor Gonzalez* (Note: Style guides vary on whether to capitalize *president* when referring to the president of the United States without including the person's name); (4) capitalize the names of laws and acts: *the Sherman Antitrust Act, the Civil Rights Act*; (5) capitalize the names of political parties but lowercase the word *party: Democratic party, Libertarian party*.

When writing about two or more geographic features of the same type, it is now accepted practice to capitalize the common noun in addition to the proper nouns, regardless of word order:

> Lakes Ontario and Huron
> Allegheny and Monongahela Rivers
> Corson and Ravenna Avenues

The names of languages, races, and ethnic groups are capitalized: Japanese, Caucasian, Hispanic. But racial terms that denote only skin color are not capitalized: black, white.

When referring to the titles of books, articles, magazines, newspapers, reports, movies, and so on, you should capitalize the first and last words and all nouns, pronouns, adjectives, verbs, and adverbs and capitalize prepositions and conjunctions with five letters or more. Except for the first and last words, do not capitalize articles:

> *Economics During the Great War*
> "An Investigation into the Market for Long-Distance Services"
> "What Successes Are Made Of"

When *the* is part of the official name of a newspaper or magazine, it should be treated this way too:

> *The Wall Street Journal*

References to specific pages, paragraphs, lines, and the like are not capitalized: *page* 73, *line 3*. However, in most other numbered or lettered references, the identifying term is capitalized:

> Chapter 4 Serial No. 382-2203 Item B-11

Finally, the names of academic degrees are capitalized when they follow a person's name but are not capitalized when used in a general sense:

> I received a bachelor of science degree.
> Thomas Whitelaw, Doctor of Philosophy, will attend.

Similarly, general courses of study are not capitalized, but the names of specific classes are:

> She studied accounting as an undergraduate.
> She is enrolled in Accounting 201.

3.2 UNDERSCORES AND ITALICS

Usually a line typed underneath a word or phrase either provides emphasis or indicates the title of a book, magazine, or newspaper. If possible, use italics instead of an underscore. Italics (or underlining) should also be used for defining terms and for discussing words as words:

> In this report, *net sales* refers to after-tax sales dollars.

Also use italics to set off foreign words, unless the words have become a common part of English:

> Top Shelf is considered the *sine qua non* of comic book publishers.
> Chris uses a laissez-faire [no italic] management style.

3.3 ABBREVIATIONS

Abbreviations are used heavily in tables, charts, lists, and forms. They're used sparingly in prose. Here are some abbreviation situations to watch for:

- In most cases, do not use periods with acronyms (words formed from the initial letter or letters of parts of a term): *CEO, CD-ROM, DOS, YWCA, FDA*; but *Ph.D., M.A., M.D.*
- Use periods with abbreviations such as *Mr., Ms., Sr., Jr., a.m., p.m., B.C.*, and *A.D.*
- The trend is away from using periods with such units of measure as *mph, mm*, and *lb*.
- Use periods with such Latin abbreviations as *e.g., i.e., et al.*, and *etc*. However, style guides recommend that you avoid using these Latin forms and instead use their English equivalents (*for example, that is, and others*, and *and so on*, respectively). If you must use these abbreviations, such as in parenthetical expressions or footnotes, do not put them in italics.
- Some companies have abbreviations as part of their names (*&, Co., Inc., Ltd.*). When you refer to such firms by name, be sure to double-check the preferred spelling, including spacing: AT&T, Barnes & Noble, PepsiCo, Seimens AG.
- Most style guides recommend that you spell out *United States* as a noun and reserve *U.S.* as an adjective preceding the noun modified.

One way to handle an abbreviation that you want to use throughout a document is to spell it out the first time you use it, follow it with the abbreviation in parentheses, and then use the abbreviation in the remainder of the document.

3.4 NUMBERS

Numbers may be correctly handled many ways in business writing, so follow company style. In the absence of a set style, however, generally spell out all numbers from one to nine and use arabic numerals for the rest.

There are some exceptions to this general rule. For example, never begin a sentence with a numeral:

> Twenty of us produced 641 units per week in the first 12 weeks of the year.

Use numerals for the numbers one through nine if they're in the same list as larger numbers:

> Our weekly quota rose from 9 to 15 to 27.

Use numerals for percentages, time of day (except with o'clock), dates, and (in general) dollar amounts:

> Our division is responsible for 7 percent of total sales.
>
> The meeting is scheduled for 8:30 a.m. on August 2.
>
> Add $3 for postage and handling.

When using numerals for time, be consistent: It should be *between 10:00 a.m. and 4:30 p.m.*, not *between 10 a.m. and 4:30 p.m.* Expressions such as *4:00 o'clock* and *7 a.m. in the morning* are redundant.

Use a comma in numbers expressing thousands (1,257), unless your company specifies another style. When dealing with numbers in the millions and billions, combine words and figures: 7.3 million, 2 billion.

When writing dollar amounts, use a decimal point only if cents are included. In lists of two or more dollar amounts, use the decimal point either for all or for none:

> He sent two checks, one for $67.92 and one for $90.00.

When two numbers fall next to each other in a sentence, use figures for the number that is largest, most difficult to spell, or part of a physical measurement; use words for the other:

> I have learned to manage a classroom of 30 twelve-year-olds.
>
> She won a bonus for selling 24 thirty-volume sets.
>
> You'll need twenty 3-inch bolts.

In addresses, all street numbers except One are in numerals. So are suite and room numbers and zip codes. For street names that are numbered, practice varies so widely that you should use the form specified on an organization's letterhead or in a reliable directory. All the following examples are correct:

> One Fifth Avenue — 297 Ninth Street
> 1839 44th Street — 11026 West 78 Place

Telephone numbers are always expressed in numerals. Parentheses may separate the area code from the rest of the number, but a slash or a hyphen may be used instead, especially if the entire phone number is enclosed in parentheses:

> 382-8329 (602/382-8329) 602-382-8329

Percentages are always expressed in numerals. The word *percent* is used in most cases, but % may be used in tables, forms, and statistical writing.

Ages are usually expressed in words—except when a parenthetical reference to age follows someone's name:

Mrs. Margaret Sanderson is seventy-two.

Mrs. Margaret Sanderson, 72, swims daily.

Also, ages expressed in years and months are treated like physical measurements that combine two units of measure: *5 years, 6 months*.

Physical measurements such as distance, weight, and volume are also often expressed in numerals: *9 kilometers, 5 feet 3 inches, 7 pounds 10 ounces*.

Decimal numbers are always written in numerals. In most cases, add a zero to the left of the decimal point if the number is less than one and does not already start with a zero:

1.38 .07 0.2

In a series of related decimal numbers with at least one number greater than one, make sure that all numbers smaller than one have a zero to the left of the decimal point: 1.20, 0.21, 0.09.

Simple fractions are written in words, but more complicated fractions are expressed in figures or, if easier to read, in figures and words:

two-thirds 9/32 2 hundredths

When typing ordinal numbers, such as *3rd edition* or *21st century*, your word processing program may automatically make the letters *rd* (or *st, th*, or *nd*) into a superscript. Do yourself a favor and turn that formatting function off in your "Preferences," as superscripts should not be used in regular prose or even in bibliographies.

3.5 WORD DIVISION

In general, avoid dividing words at the end of lines. When you must do so, follow these rules:

- Don't divide one-syllable words (such as *since, walked*, and *thought*), abbreviations (*mgr.*), contractions (*isn't*), or numbers expressed in numerals (*117,500*).
- Divide words between syllables, as specified in a dictionary or word-division manual.
- Make sure that at least three letters of the divided words are moved to the second line: *sin-cerely* instead of *sincere-ly*.
- Avoid *hyphen stacks* (having more than three consecutive lines that end with hyphens).
- Leave syllables consisting of a single vowel at the end of the first line (*impedi-ment* instead of *imped-iment*), except when the single vowel is part of a suffix such as *-able, -ible, -ical*, or *-ity* (*re-spons-ible* instead of *re-sponsi-ble*).
- Divide between double letters (*tomor-row*), except when the root word ends in double letters (*call-ing* instead of *cal-ling*).
- Wherever possible, divide hyphenated words at the hyphen only: instead of *anti-inde-pendence*, use *anti-independence*.
- Whenever possible, do not break URLs or email addresses. If you have to break a long URL or email address, do not insert a hyphen at the end of the first line. If the break happens at an interior period (e.g., after "blogs" in http://blogs.company.com), place the period at the beginning of the second line so that it isn't misinterpreted as a sentence-ending period at the end of the first line.

4.0 Vocabulary

Using the right word in the right place is a crucial skill in business communication. However, many pitfalls await the unwary.

4.1 FREQUENTLY CONFUSED WORDS

Because the following sets of words sound similar, be careful not to use one when you mean to use the other:

Word	Meaning
accede	to comply with
exceed	to go beyond
accept	to take
except	to exclude
access	admittance
excess	too much
advice	suggestion
advise	to suggest
affect	to influence
effect	a result
allot	to distribute
a lot	much or many
all ready	completely prepared
already	completed earlier
born	given birth to
borne	carried
capital	money; chief city
capitol	a government building

Word	Meaning
cite	to quote
sight	a view
site	a location
complement	complete amount; to go well with
compliment	expression of esteem; to flatter
corespondent	party in a divorce suit
correspondent	letter writer
council	a panel of people
counsel	advice; a lawyer
defer	to put off until later
differ	to be different
device	a mechanism
devise	to plan
die	to stop living; a tool
dye	to color
discreet	careful
discrete	separate
envelop	to surround
envelope	a covering for a letter
forth	forward
fourth	number four
holey	full of holes
holy	sacred
wholly	completely
human	of people
humane	kindly
incidence	frequency
incidents	events
instance	example
instants	moments
interstate	between states
intrastate	within a state
its	indicates possession
it's	contracted form of "it is"
later	afterward
latter	the second of two
lead	a metal; to guide
led	guided
lean	to rest at an angle
lien	a claim
levee	embankment
levy	tax
loath	reluctant
loathe	to hate
loose	free; not tight
lose	to mislay
material	substance
materiel	equipment
miner	mineworker
minor	underage person
moral	virtuous; a lesson
morale	sense of well-being
ordinance	law
ordnance	weapons
overdo	to do in excess
overdue	past due
peace	lack of conflict
piece	a fragment
pedal	a foot lever
peddle	to sell
persecute	to torment
prosecute	to sue
personal	private
personnel	employees
precedence	priority
precedents	previous events
principal	sum of money; chief; main
principle	general rule
rap	to knock
wrap	to cover
residence	home
residents	inhabitants
right	correct
rite	ceremony
write	to form words on a surface
role	a part to play

Word	Meaning
roll	to tumble; a list
root	part of a plant
rout	to defeat
route	a traveler's way
shear	to cut
sheer	thin, steep
stationary	immovable
stationery	paper
than	as compared with
then	at that time
their	belonging to them
there	in that place
they're	they are
to	a preposition
too	excessively; also
two	the number
waive	to set aside
wave	a swell of water; a gesture
weather	atmospheric conditions
whether	if
who's	contraction of "who is" or "who has"
whose	possessive form of "who"

In the preceding list, only enough of each word's meaning is given to help you distinguish between the words in each group. Several meanings are left out entirely. For more complete definitions, consult a dictionary.

4.2 FREQUENTLY MISUSED WORDS

The following words tend to be misused for reasons other than their sound. Reference books (including the *Random House College Dictionary*, revised edition; Follett's *Modern American Usage*; and Fowler's *Modern English Usage*) can help you with similar questions of usage:

a lot: When the writer means "many," *a lot* is always two separate words, never one.

aggravate/irritate: *Aggravate* means "to make things worse." Sitting in the smoke-filled room *aggravated* his sinus condition. *Irritate* means "to annoy." Her constant questions *irritated* [not *aggravated*] me.

anticipate/expect: *Anticipate* means "to prepare for": Macy's *anticipated* increased demand for athletic shoes in spring by ordering in November. In formal usage, it is incorrect to use *anticipate* for *expect*: I *expected* (not *anticipated*) a better response to our presentation than we actually got.

compose/comprise: The whole comprises the parts. The following usage is incorrect:

> The company's distribution division is *comprised* of four departments.

In that construction, *is composed of* or *consists of* would be preferable. It might be helpful to think of *comprise* as meaning "encompasses" or "contains."

> The company's distribution division *comprises* four departments.

continual/continuous: *Continual* refers to ongoing actions that have breaks:

> Her continual complaining will accomplish little in the long run.

Continuous refers to ongoing actions without interruptions or breaks:

> A *continuous* stream of paper came out of the malfunctioning printing press.

convince/persuade: One is *convinced* of a fact or that something is true; one is *persuaded* by someone else to do something. The use of *to* with *convince* is unidiomatic—you don't convince someone to do something, you persuade them to do it.

correspond with: Use this phrase when you are talking about exchanging letters. Use *correspond to* when you mean "similar to." Use either *correspond with* or *correspond to* when you mean "relate to."

dilemma/problem: Technically, a *dilemma* is a situation in which one must choose between two undesirable alternatives. It shouldn't be used when no choice is actually involved.

disinterested: This word means "fair, unbiased, having no favorites, impartial." If you mean "bored" or "not interested," use *uninterested*.

etc.: This abbreviated form of the Latin phrase *et cetera* means "and so on" or "and so forth," so it is never correct to write *and etc*. The current tendency among business writers is to use English rather than Latin.

flaunt/flout: To *flaunt* is to be ostentatious or boastful; to *flout* is to mock or scoff at.

impact: Avoid using *impact* as a verb when *influence* or *affect* is meant.

imply/infer: Both refer to hints. Their great difference lies in who is acting. The writer *implies*, the reader *infers*, sees between the lines.

its/their: Use *its* to indicate possession by a singular entity such as a company, not *their*. "HP released its quarterly results" is correct; "HP released their quarterly results" is not. (Note that in British English, companies are treated as plural entities, so "HP released their earnings" would be correct.)

lay: This word is a transitive verb. Never use it for the intransitive *lie*. (See Section 1.3.3.)

lend/loan: *Lend* is a verb; *loan* is a noun. Usage such as "Can you loan me $5?" is therefore incorrect.

less/fewer: Use *less* for uncountable quantities (such as amounts of water, air, sugar, and oil). Use *fewer* for countable quantities (such as numbers of jars, saws, words, pages, and humans). The same distinction applies to *much* and *little* (uncountable) versus *many* and *few* (countable).

liable/likely: *Liable* means "responsible for": I will hold you *liable* if this deal doesn't go through. It is incorrect to use *liable* for "possible": Anything is *likely* (not *liable*) to happen.

literally: *Literally* means "actually" or "precisely"; it is often misused to mean "almost" or "virtually." It is usually best left out entirely or replaced with *figuratively*.

many/much: See *less/fewer*.

regardless: The *less* suffix is the negative part. No word needs two negative parts, so don't add *ir* (a negative prefix) to the beginning. There is no such word as *irregardless*.

try: Always follow with *to*, never *and*.

verbal: People in the business community who are careful with language frown on those who use *verbal* to mean "spoken" or "oral." Many others do say "verbal agreement." Strictly speaking, *verbal* means "of words" and therefore includes both spoken and written words. Follow company usage in this matter.

4.3 FREQUENTLY MISSPELLED WORDS

All of us, even the world's best spellers, sometimes have to check a dictionary for the spelling of some words. People who have never memorized the spelling of commonly used words must look up so many that they grow exasperated and give up on spelling words correctly.

Don't expect perfection and don't surrender. If you can memorize the spelling of just the words listed here, you'll need the dictionary far less often and you'll write with more confidence:

absence
absorption
accessible
accommodate
accumulate
achieve
advantageous
affiliated
analyze
apparent
appropriate
argument
asphalt
assistant
asterisk
auditor

bankruptcy
believable
brilliant
bulletin

calendar
campaign
category
ceiling
changeable
clientele
collateral
committee
comparative
competitor
concede
congratulations
connoisseur
consensus
convenient
convertible
corroborate
criticism

definitely
description
desirable
dilemma
disappear
disappoint
disbursement
discrepancy
dissatisfied
dissipate

eligible
embarrassing
endorsement
exaggerate
exceed
exhaust
existence
extraordinary

fallacy
familiar
flexible
fluctuation
forty

gesture
grievous

haphazard
harassment
holiday

illegible
immigrant
incidentally
indelible
independent
indispensable
insistent
intermediary
irresistible

jewelry
judgment
judicial

labeling
legitimate
leisure
license
litigation

maintenance
mathematics
mediocre
minimum

necessary
negligence
negotiable

newsstand
noticeable

occurrence
omission

parallel
pastime
peaceable
permanent
perseverance
persistent
personnel
persuade
possesses
precede
predictable
preferred
privilege
procedure
proceed
pronunciation
psychology
pursue

questionnaire

receive
recommend

repetition
rescind
rhythmical
ridiculous

salable
secretary
seize
separate
sincerely
succeed
suddenness
superintendent
supersede
surprise

tangible
tariff
technique
tenant
truly

unanimous
until

vacillate
vacuum
vicious

4.4 TRANSITIONAL WORDS AND PHRASES

The following sentences don't communicate as well as they could because they lack a transitional word or phrase:

> Production delays are inevitable. Our current lag time in filling orders is one month.

A semicolon between the two sentences would signal a close relationship between their meanings, but it wouldn't even hint at what that relationship is. Here are the sentences again, now linked by means of a semicolon, with a space for a transitional word or phrase:

> Production delays are inevitable; _____, our current lag time in filling orders is one month.

Now read the sentence with *nevertheless* in the blank space. Then try *therefore, incidentally, in fact*, and *at any rate* in the blank. Each substitution changes the meaning of the sentence.

Here are some transitional words (conjunctive adverbs) that will help you write more clearly:

accordingly	however	moreover
anyway	incidentally	otherwise
consequently	likewise	still
finally	meanwhile	therefore
furthermore		

The following transitional phrases are used in the same way:

as a result	in the second place
for example	on the other hand
in fact	to the contrary
in other words	

When one of these words or phrases joins two independent clauses, it should be preceded by a semicolon and followed by a comma:

> The consultant recommended a complete reorganization; moreover, she suggested that we drop several products.

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