Business Communication Skills for Managers

Lumen Learning

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COURSE CONTENTS

ABOUT THIS COURSE

In Business Communication Skills for Managers, students learn how to effectively communicate in business, with an emphasis on the use of these skills as a manager. The course introduces important elements of successful communication, providing examples of effective communication and providing students opportunities to practice the same. The course covers the essentials of communication including professional writing, visual aids, presentations, speeches, phone and online communication, and both getting hired and finding new hires.

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About Lumen

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If you'd like to connect with us to learn more about adopting this course, please Contact Us.

You can also make an appointment for OER Office Hours to connect virtually with a live Lumen expert about any question you may have.

LEARNING OUTCOMES

The content, assignments, and assessments for Business Communication Skills for Managers are aligned to the following learning outcomes. A full list of course learning outcomes can be viewed here: Business Communication Skills for Managers Learning Outcomes.

Module 1: Identify key principles in business communication

Communicating in Business

- Discuss the importance of effective communication in business Effective Communication in Business
- Differentiate between different methods of communication Methods of Communication
- Discuss the importance of ethical communication Ethics in Business Communication
- Discuss the importance of staying connected with colleagues, other professionals, and customers in the digital age Staying Connected

Module 2: Writing in Business

Discuss different processes and considerations involved in writing in business

- Write a business communication given a specific audience and purpose
- Discuss the impact that word choice and tone can have on a business message
- Identify the three parts of the writing process
- Use common word processing software to write business messages

Module 3: Written Communication

Identify the appropriate use of different channels of written communication in business

- Discuss the shift from paper to digital communication
- Compose emails and memos intended for an audience within the same company or team as the writer
- Identify other common methods of professional communication

- Discuss appropriate ways to communicate to an audience outside of the company
- Determine the appropriate communication channel for a specific type of message

Module 4: Research

Use traditional and online tools and methods to find, evaluate, and process information

- Discuss the importance of data and identify its role in business
- Process information from internal sources
- Evaluate and practice preliminary, intermediate, and advanced search techniques
- Evaluate and practice methods of analysis to assess the quality and reliability of a source
- Discuss issues of plagiarism, copyright and fair use

Module 5: Visual Media

Create meaningful visual media

- Find the best media to present your message
- Discuss how to most effectively use images in business messages and identify potential sources for these images
- Discuss how to most effectively use charts, diagrams, and other graphics in business messages and identify potential sources for these visual aids
- Discuss the use of video in business messages
- Identify ways to make information more accessible to your audience
- Incorporating meaningful visual media in business messages

Module 6: Reports

Create various types of business reports

- Discuss the different types of reports and their purposes
- Create an informal report
- Create formal reports and proposals

Module 7: Public Speaking

Identify key principles in public speaking for business

- Identify key principles of effective public speaking
- Describe delivery techniques for use during a public speech
- Identify the role and importance of your audience
- Discuss tips and tricks to giving an effective speech

Module 8: Developing and Delivering Business Presentations

Create a presentation using slides and other visual aids

- Discuss the usefulness of visual aids and identify common presentation tools
- Create a presentation using Microsoft PowerPoint

- Create a presentation using Google Slides
- Create a presentation intended for a business meeting

Module 9: Communicating through Technology

Organize and participate in meetings using phone and video conferencing tools

- Recognize common types of tools for audio, video, and web sharing tools
- Use common planning tools to schedule business meetings
- Schedule meetings with audio, video, and web sharing components
- Use audio conferencing tools effectively in a business context
- Use video conferencing tools effectively in a business context
- Use web sharing tools effectively in a business context

Module 10: Social Media

Use social media to present a business message

- Identify common social media platforms used by businesses
- Identify social media platforms that are typically less frequently used by businesses
- Use various types of social media to increase your sales
- Use various types of social media to build affinity with your customers and make your brand stand out

Module 11: Communicating Different Messages

Write various types of business messages, including informative messages, team-focused messages, criticism, and response messages

- Identify the appropriate usage of informative business messages and write an informative business message
- Discuss the importance of team-focused communication in business
- Write a business message criticizing internal or external business situations
- Write a response to criticism

Module 12: Collaboration in and across Teams

Identify ways to collaborate in business within a team and across multiple teams

- Discuss the role and types of teams in workplace communication
- Discuss strategies for working in collaborative projects
- Discuss best practices in workplace etiquette

Module 13: Social Diversity in the Workplace

Propose solutions to challenges that may occur in communication, especially across cultures in a global marketplace

- Define diversity and discuss its influence on the workplace
- Discuss how different cultures impact the workplace
- Discuss the how gender impacts communication in the workplace
- Discuss the impact of disabilities in the workplace
- Discuss different strategies for talking to individuals from a different generation
- Discuss strategies for creating a functional workplace by combating biases

Module 14: Finding a Job

Create a resume, a cover letter, and a profile on professional social media sites

- Discuss how to gain skills necessary for professional life
- Discuss the importance of networking, and identify strategies to increase your professional network
- Produce a résumé and a cover letter
- Discuss effective interview strategies and prepare for common interview questions

Module 15: Recruiting and Selecting New Employees

Describe effective strategies for recruiting and selecting qualified job applicants

- Describe effective strategies for recruiting qualified job applicants
- Discuss the key elements of a successful interview
- Identify the key steps in selecting a new employee

MODULE 1: COMMUNICATING IN BUSINESS

WHY IT MATTERS: COMMUNICATING IN BUSINESS

Why learn to effectively communicate in business?

Business is about people. We exist to serve people with our products and services, to employ them and pay them to do work, to purchase the supplies and merchandise we need to operate. To be in business is to be surrounded by people who interact with you, who require something from you.

Communication is the connection between people. It could be a shared photograph, a letter or a smoke signal, but as long as one person is sending a message and another person is understanding it, communication is happening.

The successful professional builds and maintains relationships, completes tasks, directs teams, and expresses ideas via effective communication. To be successful you'll need to be an effective communicator: you need to be understood.

Playwright George Bernard Shaw is quoted as saying, “The single biggest problem in communication is the illusion that it has taken place.” This module is the first step in dispelling the illusion. Here we will talk about the elements of communication—recognizing the pattern of good communication, the types of communication you're likely to see in the workplace, and the kinds of tools you can use to effectively build your message, deliver it, and be understood by your audience.

EFFECTIVE COMMUNICATION IN BUSINESS

What you'll learn to do: Discuss the importance of effective communication in business

Communication happens when all parties are engaged in uncovering and understanding the meaning behind the words. It's not something that one person does alone. But when you, as a business professional, make your contribution to the uncovering and understanding process, you should strive to be:

- Clear
- Concise
- Objective
- Consistent
- Complete
- Relevant
- Understanding of Audience Knowledge

These are the seven pillars, or principles, of business communication. If you open your mouth, put pen to paper, or pick up a camera to make a video, you should be striving to create a message that meets these criteria.

Why? Well, the point of communication is not to talk. It's to be understood. When your team understands you, they deliver results. When your customers understand you, they buy. When your manager understands you, she advocates for you and supports you in your career.

This module will talk about the benefits of effective business communication and how, using the principles above, you can improve your communication skills and be more successful in business.

LEARNING OUTCOMES

- Discuss how effective communication improves you as an employee
- Identify characteristics of your audience in business communication
- Discuss the process of the social communication model
- Identify key features of effective writing in business
- Discuss the overlap between professional and personal communication

Becoming a Better Employee

Communication is something we often take for granted but not often something we think to improve. And yet, being a good communicator can open doors for you as an employee, make you more valuable to your employer and help you get ahead.

Think about the tree swing in Figure 1. The creation of that swing started out all wrong and then got worse from there.

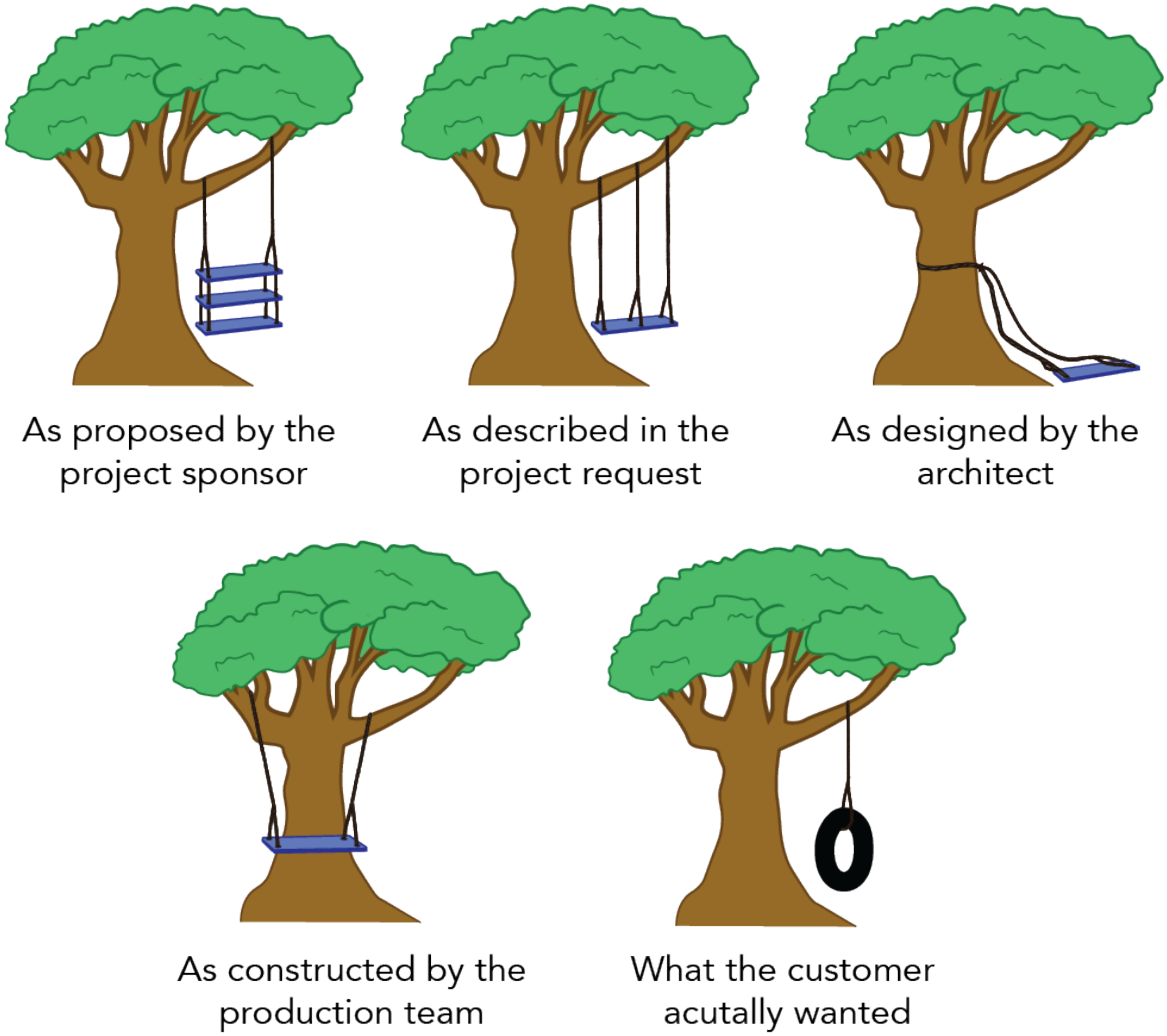

Figure 1. This common example of a tree swing shows just how things can go wrong as you create a new product or service.

Let's approach that process as though you were in charge. How could you have been a better employee and improved that result with better communication? We'll look at it step by step.

1. **Meeting with the project sponsor:** As the sales associate of this tree swing, you met with the project sponsor, Mark, and heard his translation of the customer's wishes. Mark very clearly told you he wanted a swing with three seats, one on top of another. Now, you're an expert on tree swings. Does his request make sense? This is an effective communication opportunity. You could have asked questions, clarified and repeated back what Mark was telling you. You could have told him that this kind of swing design was highly unusual and not generally embraced by tree swing aficionados. An opportunity to engage in effective communication with the customer was missed.
2. **Specifying the project request:** This is where you, as swing sales person, made your first mistake. Rather than requesting three seats, you requested three ropes to secure the swing to the tree. This is another effective communication opportunity. You could have proofread and double-checked to make sure your request matched Mark's request, but you did not. An opportunity to ensure effective communication via reinforcement and repetition was missed.
3. **Designing, production and installation:** Here's where the project went from wrong to wrong-er. Your swing production team not only didn't question your request for three ropes, they went off and did their own thing with the concept and design of the product. The architect misunderstood your request completely. The production team reviewed the architect's request and knew his design wasn't functional,

and so made their own changes. Finally, the installation team got there and the product wouldn't work without additional reinforcements, so they did what was needed to make the product functional. This is another effective communication opportunity Not only did they miss opportunities to communicate with each other, but you missed an opportunity for follow-up, reinforcement and repetition.

Your manager, Gloria, is going to get calls from customers, and when she's done hearing their complaints, is she going to think you're employee of the year? Probably not. You didn't deliver good results.

PRACTICE QUESTION

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Employees who communicate effectively by listening, repeating, reinforcing and following up avoid all these issues. They are presented with a problem, they take in all the necessary information, and then they direct their teams with messaging that is

- Clear
- Concise
- Objective
- Consistent
- Complete
- Relevant
- Considerate of the knowledge his audience possesses

Because of better communication, they become better team members, co-workers, and employees.

The Business Audience

As a business communicator, you'll be communicating to two types of audiences.

- Your **primary audience** is the audience that your communication is intended for. For instance, if you're preparing an earnings report, the audience is likely your senior team. They will review the information, give you feedback, and decide if they need to take action based on the information you've provided.
- Your **secondary audience** is the group of people that aren't real stakeholders in your communication. That same earnings report, with the senior team as its primary audience, might find other audiences in investors, stockholders, or even your competitors or the media. They may comment on your data or take action on it.

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Why is it important to understand primary and secondary audiences and what the differences are between them? Consider the following points:

- **Managing information:** When you consider the information you should be communicating, you need to consider the needs of your primary audience first. The information they require to do their work is your first concern. Any information that would be important to a secondary audience should be relegated to a less prominent area of the report.

- Managing language: A key factor in communicating effectively is the assessment of the knowledge that your intended audience brings to the table. If your primary audience is a bunch of school kids and your challenge is to explain key economic factors in the 1929 stock market collapse, your language will be much different than if you explain it to a group of historians. Choose the correct language to communicate.
- Managing the depth of your topic: The human resources team might want to dig into a turnover report in great detail and, if they're your primary audience, it's your job to communicate that information to them. On the other hand, the CEO may just want to know what the annualized rate is. "Are people staying or are they leaving?" he will ask. Sometimes a simple, "Staying," is all he needs to know.

You will communicate more effectively if you understand your audience and the depth of knowledge they bring with them to the communication event.

The Social Communication Model

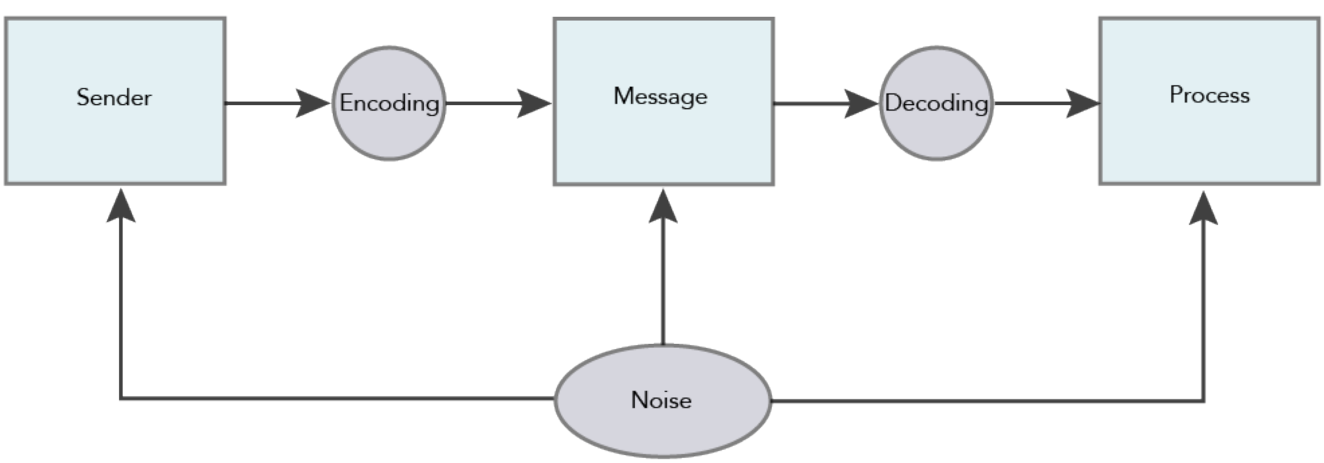
Communication suggests a linear process. There's a sender of a message—let's say that's you talking. You put your thoughts into words. And then there's a recipient of a message. He hears those words and considers their meaning. That's your co-worker, listening. It looks something like this:

You, the sender, have a thought. You put that thought into words (encoding). The message comes out of your mouth, and then it is decoded (processed) by the recipient, your co-worker, who then decides on the meaning of your words as a result of that decoding process.

But what you say isn't always what your co-worker hears. And that's where things go wrong.

Let's pretend that you're listening to some music, a good Jimi Hendrix tune. And you sing along with the lyric, "Excuse me while I kiss the sky": *Purple Haze*—classic Jimi Hendrix.

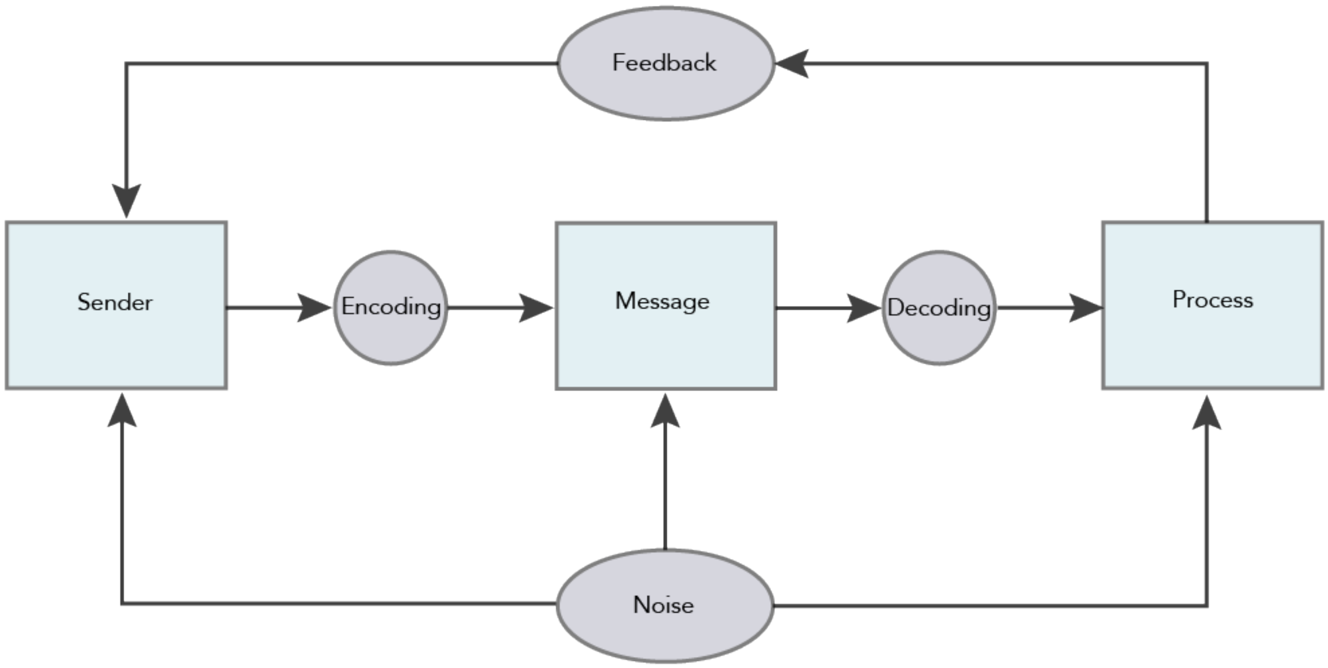
So, you're inspired by the music and sing the words in much the same way Jimi sings it. You think it, you put it into words (encoding it), and it becomes a message. Is everything good? Maybe not. It's possible that Jimi's "stylized" approach to singing lyrics is going to get in the way of your message. This is called noise.



The noise disturbing your message can jump in at any time. It can be actual noise, it can be a concept misunderstood by the sender before the message is even formed, it can be a message that's not articulated properly, or it can be a message that's just not understood by the receiver. In this case, the "noise" is you imitating the way Jimi sings his lyric, which is not spoken all that clearly.

Your co-worker hears your communication, and the message you encoded and sent to him is not decoded in the same way, because the decoding process is affected by "noise." As a result, your coworker thinks you've said, "Excuse me while I kiss this guy."

He frowns and tells you, "You probably shouldn't be kissing anyone at work." This is called feedback.



Your recipient has let you know that you've been misunderstood by giving you feedback. At this point you can:

- Repeat the message a second time
- Ask some clarifying questions to determine why your recipient didn't understand what you said and then address those issues on your next attempt to communicate your idea.

In this case, you immediately realize how you've been misunderstood. This happens all the time when people hear this song. You process the feedback and encode a new message. You tell him, "No. It's 'Excuse me while I kiss *the sky*.' Not 'Excuse me while I kiss this guy.'"

When the communication is only linear, extending from sender to recipient, you're talking *at* your audience. The minute there's feedback from the audience, like with the social communication model, you're talking *with* your audience. Talking with an audience ensures a better level of understanding.

Effective communication means leveraging the social communication model to make sure your team is all singing the same song.

PRACTICE QUESTION

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Writing in Business

Just like having a face-to-face discussion, effective business writing should rely on the seven principles of business communication:

- Clear
- Concise
- Objective
- Consistent
- Complete
- Relevant
- Considerate of Audience Knowledge

When you put pen to paper, you should be considering every principle. We've looked at these principles before, but now let's take a deep dive into how they might impact your writing.

PHONE SYSTEM OUTAGE

Let's assume that you're writing a communication to let everyone know that the corporate office phone system will be down for a certain period of time next Friday morning. Let's take a look at how each of the principles of business communication figure into that written message.

- Clear: When you craft the message, you should make sure that it's clear to your readers. In this case, you want the entire company to know that the corporate office phone systems will be down between 9 and noon. Being clear means that you add *a.m.* and *p.m.*, even if you think it might be obvious. You should indicate that you're talking about Pacific Standard Time, and so on.
- Concise: Since it's a message about the phone system, it should be a message only about the phone system. And then, a message only about the outage. If you're inspired to include, "Tom broke the phone system last week and now it needs to be repaired," resist this urge. Even if Tom is responsible for the outage, it may be appropriate to joke with Tom about it if he's a personal friend, but this is not the kind of messaging that should go out to the whole office.
- Objective: Your own personal feelings and comments do not need to be a part of the phone communication. For instance, "Even though the timing is poor for those working on the polling project, we intend to repair our phone system on Friday" is a great example of *not* being objective.
- Consistent: If the phone system has been out three or four times before, your message should be similar in nature to those that came before it. If one of the details of the phone system is that it's being upgraded so we can add a new satellite office to the trunk line, don't include information contrary to this fact unless it is explained. Consistent means that the details are the same each time–that the communication looks the same, sounds the same; and that any new details are called out.
- Complete: If you set out to tell the company that the phone system is going to be out at 9:00 a.m. on Friday morning and then fail to tell them when it will be back up, then your message is incomplete. Strive to be complete in your written communication by anticipating any question a reader might ask:

"Is the phone system going down this Friday or next Friday?" "How long will it be down?" "Is the whole corporate office affected or just a portion?"

- **Relevant:** When considering whether a message is relevant, you can ask yourself, "Are these readers affected by this information?" "Does it matter that the phones will be out on Friday if the office is closed for the holiday?" It also means not including information that isn't relevant to the reader, such as, "The repair people think that, by replacing the left widget on the main switchboard, they may solve the problem, but it could also be the right widget, in which case they'll need to order a part." This is *not* relevant.
- **Considerate of Audience Knowledge:** Always keep in mind the knowledge your audience brings to the message. If you're communicating the details of nuclear fission to a group, you would talk to them differently depending on how much they knew about science. In this case, everyone understands what a phone is. (Though those two extraterrestrials just hired in real estate may need to know it's the black thing on their desk with the handset you can put up to your ear.)

It's incredibly important to measure your written communication against the seven principles of business communication because in written communication, the "feedback" portion of that social communication model isn't always accessible. When noise enters your written communication, you often don't immediately know that your audience doesn't understand, sometimes until it's too late. Make sure you measure your message against the seven principles to stay ahead of any misunderstandings.

PRACTICE QUESTION

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Personal and Professional Communication

When you consider the difference between communication on a personal level and communication on a professional level, the first thing that comes to mind is the level of formality. In personal communication, you typically use relaxed language, and the level of knowledge your audience brings into the communication is usually significant and personal. The need to be clear and concise, to be objective, is thrown aside. Personal communications are often meant only for a single audience and are oftentimes understandable only to that audience.

Professional communication, on the other hand, is read by an audience that you don't know as well. You find you need to make an effort to be clear, concise, relevant and objective. You make an effort to appeal to and be understood by a more diverse group.

However, with the advent of technology and social media, the lines between personal and professional communication are becoming blurred. Your customers are looking to connect with your company on a deeper, more personal level. Technology has turned the 9–5 worker into an always-accessible team member, and because of it, professional relationships are evolving into something that straddles the line between formal and informal. Customers, vendors, and even co-workers want to deal with a human being, not someone hiding behind the curtain and operating the great and powerful talking head that runs the company. Add to that myriad methods of informal communication platforms like texting and social media, and you can see there's a revolution going on here.

Your business communications are destined to be affected by this shifting tide. If companies with strong brands are going out of their way to connect with their customers on social media and share the "human side" of their businesses, then there's no reason why you shouldn't follow suit as long as you feel comfortable doing so.

Some things to keep in mind if you're going to give it a try:

- **Don't give up the seven principles of business communication:** No matter how personal you get, those principles are still the hallmark of a successful message. Your wider audience still needs clarity, uniformity, and so on. Your goal is to be understood, to yield a particular business result, and that doesn't change.
- **Don't get personal to the point of irrelevance:** Your co-workers and vendors might enjoy knowing that you're a huge football fan, but they don't need to know what you had for lunch today.
- **Don't share details that might not be easily embraced:** People don't always receive the message well if you express strong political beliefs that don't fit with theirs. Be careful about sharing your "ideals." GoDaddy.com CEO Bob Parsons got called out in 2011 when he made a video of his exploits hunting elephants and posted it to his company's site so he could "share" himself with the world. The attention he got for his moment of personal sharing wasn't good.

Even though professional communication and personal communication are quickly becoming just "communication," your success still hinges on being successful at it. Strengthen your command of the seven communication principles and move forward bravely with your list of shareable personality traits.

PRACTICE QUESTION

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METHODS OF COMMUNICATION

What you'll learn to do: Differentiate between different methods of communication

Words are just the beginning of communication and, to hear people tell it, they're actually a very small part of the message we take in. Don't believe it? Imagine you're hanging out with your teenage cousin, and you ask him if he's feeling happy today. He might respond, "Yeah, sure." But depending on the tone of his voice and his body language, you might not believe him.

Listening and nonverbal cues affect communication as much as the written or spoken word. In this section, we're going to learn how to use listening, verbal communication, and nonverbal communication to your advantage, so you can better understand and be better understood.

LEARNING OUTCOMES

- Discuss the importance of listening
- Discuss verbal communication and its role in business
- Discuss nonverbal communication and its role in business

Listening

How many times have you wanted to talk about a subject very important to you only to find that the people you're talking to aren't really listening? They may look like they're listening, but they're really not paying attention at all. Frustrating, isn't it? How often do you find yourself falling into this same trap, finding that you're so eager to share your information that you completely stop listening to the person who's talking?

Communication isn't just about talking, it's about listening. In fact, communication only happens when all parties are engaged in uncovering and understanding the meaning behind the words. Otherwise, it's just a bunch of chatter!

Figure 1. Listening is a key component of communication.

Active Listening

During active listening, listeners give feedback to the speaker, confirming an understanding of what the speaker has said by asking questions and making clarifying statements. Rather than focusing on what they want to say once it's their turn to speak or allowing themselves to be distracted, they're reassuring the speaker that they're interested in the subject matter and want to completely understand the point the speaker is trying to make. It's the ultimate way of making a fellow participant feel safe in the conversation.

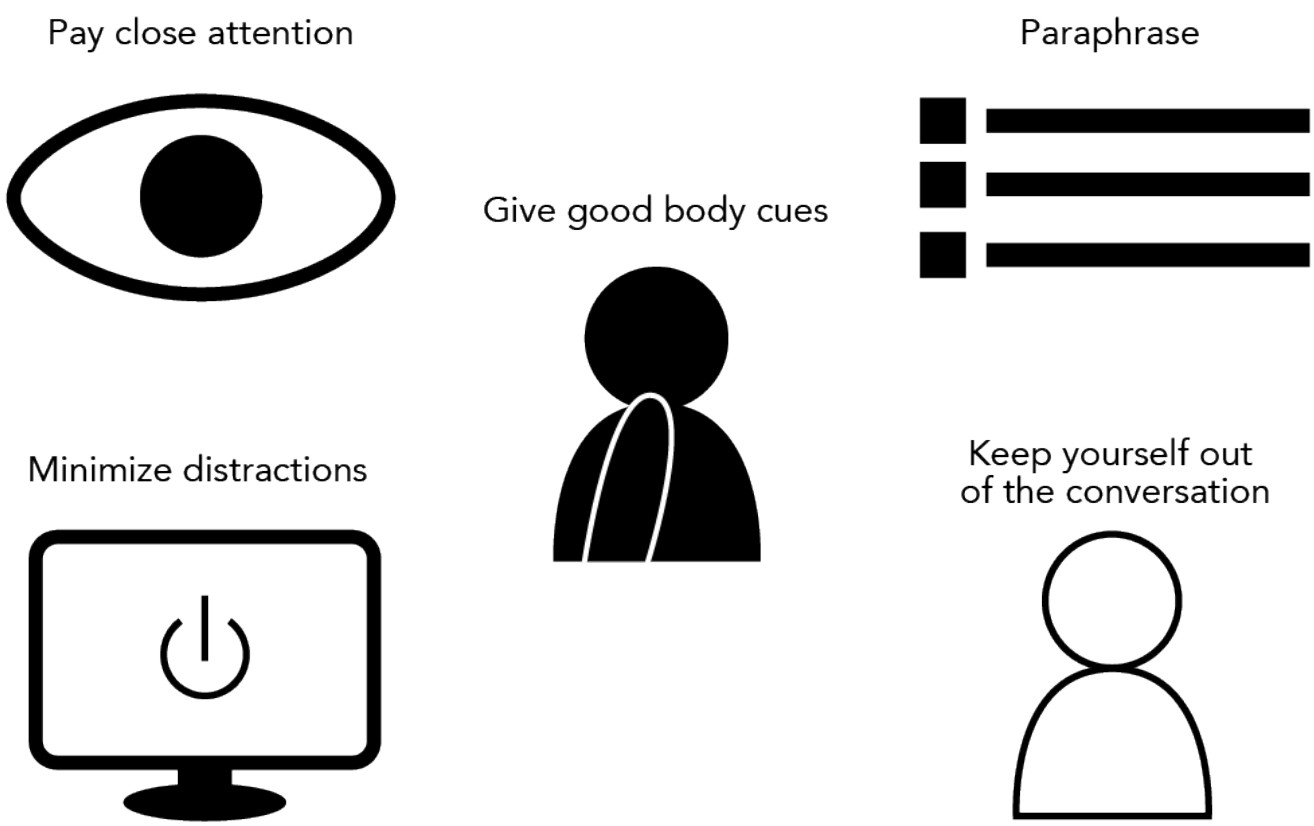

Figure 2. Five key skills for active listening

Here are some key skills you should master in order to be an active listener:

1. **Pay close attention and paraphrase to ensure understanding:** If you can step into the conversation by saying, "So let me see if I understand this correctly. What you're saying is…." then you're listening hard enough. If you're saying, "Uh-huh, uh-huh," but not really recapping a set of statements, then try listening a little harder.
2. **Ask open ended questions:** These questions can encourage the speaker to elaborate on a point, rather than forcing them to say yes or no. This elaboration can also help you understand better what the speaker is trying to communicate.
3. **Give good body cues:** Make eye contact, lean in while the speaker is talking, and don't let your gaze drift away. If you're leaning back in a chair reading what's on your computer monitor, the speaker isn't going to feel like you're paying attention even if you are. You can also use body cues to reflect the speaker's emotions—you don't have to laugh or cry along, but you can indicate a level of understanding with a facial expression or a nod.
4. **Minimize distractions:** Turn off your radio or push your monitor in another direction in order to pay closer attention to what your guest has to say. When someone is talking to you, do your best to minimize anything that could steal your attention away from the conversation.
5. **Keep yourself out of the conversation:** Avoid sharing how you handled a similar issue, unless you're specifically asked for advice. Keep an open mind about the subject matter, even if you don't agree. If someone is complaining about your previous behavior or choices, wait until he or she is done before you launch into a defense. Better yet, don't launch into a defense. Instead, ask clarifying questions and make sure that you totally understand the other person's point of view before crafting your response.

PRACTICE QUESTION

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Those are just a few techniques you can use to become a better listener, but there are also a few ways to ensure that you're heard. Take those same hints for active listening and turn them around a bit:

- **Help your audience by paraphrasing:** If no one in your audience is being kind enough to break in to clarify his understanding of your point, then do it for them! Pause mid-point and say, "Let me stop here for a moment. Am I being clear about what I'm trying to say? Is there anything up to this point that you'd like me to go over again?" By posing these questions, you're encouraging your audience to participate in active listening.
- **Minimize things that could be distracting during your conversation:** Don't be afraid to ask your audience to turn off the television for a moment while you make an important point.
- **Keep your audience out of the conversation:** In much the same way you kept yourself out of the conversation when someone else was talking, don't invite them to share their own personal stories. It distracts from the point you're trying to make.

Without listening, there is no understanding. By listening, you can assess your audience's needs and address them. By ensuring that you're heard, you can deliver business results.

Verbal Communication

Verbal communication is perhaps the most obvious and understood mode of communication, and it is certainly a powerful tool in your communication toolbox. Put simply, verbal communication is the sharing of information between two individuals using words.

Spoken versus Written Communication

While we typically focus on speech while talking about verbal communication, it's important to remember that writing is also a form of verbal communication. After all, writing uses words too!

Imagine for a moment that you're a college student who is struggling with material in a class. Rather than simply giving up, you decide that you're going to ask your instructor for the guidance you need to make it through the end of the semester. Now, you have a few choices for using verbal communication to do this. You might choose to call your instructor, if they've provided contact information, or talk to them in person after class or during office hours. You may take a different approach and send them an email. You can probably identify your own list of pros and cons for each of these approaches. But really, what's the difference between writing and talking in these situations? Let's look at four of the major differences between the two:

1. **Formal versus Informal:** We generally use spoken communication informally while we use written communication formally.
2. **Synchronous versus Asynchronous:** Synchronous communication is communication that takes place in real time, such as a conversation with a friend. In contrast, asynchronous communication is communication that is not immediate and occurs over longer periods of time, such as letters, email, or even text messages.
3. **Recorded versus Unrecorded:** Written communication is generally archived and recorded for later retrieval while spoken communication is generally not recorded.

Benefits of Spoken Communication

Spoken communication can be a conversation, a meeting, or even a speech. Spoken communication is powerful in that it allows for input from every part of the social communication model. You encode your thoughts into the spoken word and look to your audience to decode and take the message in. You can ask for feedback directly to confirm understanding of your message.

In a world where we do most of our talking by email and text, spoken communication is a breath of fresh air. Leverage the power of spoken communication to create relationships—you can establish a rapport and a sense of trust with your audience when you speak with them. Spoken communication allows you to bond on a more emotional level with your listeners.

Spoken communication also also makes it easier to ensure understanding by addressing objections and clearing up misunderstandings: you can adjust your message as you communicate it, based on the feedback you're getting from your audience. Spoken communication allows you to walk away from a conversation with a higher degree of certainty that your message was received.

PRACTICE QUESTIONS

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Verbal communication is a powerful tool, and it's made even more powerful when paired with listening and nonverbal communication.

Nonverbal Communication

We've already employed a little bit of nonverbal communication with the active listening skills we've previously discussed: nodding, facial expressions, leaning toward the speaker to show interest—all of those are forms of nonverbal communication. Body language can reinforce your spoken message or it can contradict it entirely.

There's a myth that says that when you speak, only 35 percent of your communication is verbal and 65 percent of it is nonverbal. That's not entirely true (or else foreign languages would be much easier to understand!). But it's absolutely true that nonverbal communication can make or break your message. Here are some types of nonverbal communication and the effects they can have on the success of your communication:

- **Facial expressions:** Your teenage cousin we referred to at the beginning of this section might have told you he was happy, but his apathetic facial expression may have communicated different information. Facial expressions—happy, sad, angry—help you convey your message. Be aware of your facial expression when you talk and particularly when you listen, which is when it's easy to forget.
- **Gestures:** When you speak, a gesture can make your message stronger. Pointing out something you want your listener to look at more closely is an example of nonverbal communication that makes your message understood. Motioning warmly toward a coworker who deserves special recognition, making a fist to show frustration or anger, such gestures help further engage your audience when you speak.
- **Proximity:** How close you are to your audience when you speak sends a nonverbal message. If your size is imposing and you leave a very small distance between you and your listener, it's likely your nonverbal communication will be a bit threatening. On the other hand, giving someone too much space is an awkward nonverbal communication that might confuse your listener.
- **Touch:** Shaking an audience member's hand, putting your hand on his shoulder: these are nonverbal cues that can affect the success of your message. Touch communicates affection, but it also communicates power. In fact, when women touch a listener, it's often assumed that they're being affectionate or conveying empathy, but when a man touches a listener, it can be taken as a sign of communicating power or even dominance.
- **Eye contact:** Making and maintaining eye contact with an audience when you're verbally communicating or listening communicates to the other party that you're interested and engaged in the conversation. Good eye contact often conveys the trait of honesty to the other party.
- **Appearance:** Your clothing, hair, and jewelry are also a part of nonverbal communication. If you put a dachshund pin on your lapel each morning (because you have a pet dachshund), that says something about you as a person. Similarly, the quality and condition of your clothing, how it fits, if it's appropriate for the season—all of these things speak nonverbally about you as a communicator.

Nonverbal communication reveals a lot about you as a communicator and how you relate to other people. It pays to be aware of the elements of your nonverbal communication so you can maximize the impact of your message.

PRACTICE QUESTIONS

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ETHICS IN BUSINESS COMMUNICATION

What you'll learn to do: Discuss the importance of ethical communication

As business practices become more transparent and the people behind those businesses become more public, customers and patrons begin to expect more from these businesses. It's no longer a faceless corporation trudging a long making a profit and paying their investors. Because of this, in order to be successful in today's environment, a company has to be socially conscious and to behave ethically.

That's a trend whose thread is woven into every aspect of business, and that's not a bad thing. Communicators should absolutely be cultivating a level of trust and integrity in each of their messages. They should be socially conscious and inclusive in their communications. It's what audiences expect and, frankly, what they should have.

In this module we'll take a look at the guidelines for ethical communication and how they apply to verbal, written and online communications.

LEARNING OUTCOMES

- Identify key guidelines for ethical business communication
- Describe how to communicate ethically online

Guidelines for Ethical Communication

It's not enough for a communicator to craft a message that's clearly understood by his audience, leveraging the seven principles of business communication:

- Clear
- Concise
- Objective
- Consistent
- Complete
- Relevant
- Understanding of Audience Knowledge

In reality, if you adhere to the seven principles, you will communicate ethically. For instance, if you craft a message that is not clear and concise, and you use tricky language that manipulates your consideration for your audience's knowledge, then you are not being ethical. If you're not being objective, and you are trying to communicate your opinion (or the opinion of others) as fact, then you are not being ethical. If you purposely do not disclose complete information, then you are not being ethical.

Figure 1. How might ethics affect the decisions you make as an employee?

You don't have to look too far today to see examples of unethical communication; they're all over the media. "Fake news" media sites abound, even though social media outlets like Facebook and Twitter are making efforts to prevent them from being posted and shared. Is fake news ethical?

DAILY WORLD UPDATE

Daily World Update is a fake news site that recently claimed that "Black Woman Who Won Georgia Primary Arrested for Election Fraud." The story talks about Michelle Agabobo Willford, running for governor of Georgia, who paid for "tens of thousands of votes" by promising free welfare. This story runs parallel to a real-life story of Stacy Abrahms, who is a candidate for Georgia governor and recently won a primary election (without paying for votes). Her success made news, because, if she wins, she will be the nation's first black female governor.

Now, the *Daily World Update* claims to be a satirical site, and this article about Michelle Agabobo Willford fake, but if this news story is shared on social media, people just see the headline and jump to their own conclusions about what happened in Georgia. Is this ethical communication? Does it meet those seven business communication objectives above?

GENERAL MOTORS

General Motors now admits that over 100 people died because of faulty ignition switches that were not recalled. In an article in *Forbes* magazine, reporter Carmine Gallo claimed that "Two Misleading Words Triggered GM's Catastrophic Communication Breakdown." The article discusses that the ignition issue was mis-labeled as a "customer convenience" issue and therefore didn't get the attention it needed. Data about the issue was buried in the back of a 72-page PowerPoint deck. These were communication choices made by human beings. Was it a mistake, or was it unethical?

The seven principles of business communication should be enough to keep your messages ethical. But if you want further guidance as to what is and is not ethical in business communication, the International Association of Business Communicators outlines a code of ethics for all its members: (Note: International Association of Business Communicators, "IABC Code of Ethics for Professional Communicators.")

- I am honest—my actions bring respect for and trust in the communication profession.
- I communicate accurate information and promptly correct any errors.
- I obey laws and public policies; if I violate any law or public policy, I act promptly to correct the situation.
- I protect confidential information while acting within the law.
- I support the ideals of free speech, freedom of assembly, and access to an open marketplace of ideas.
- I am sensitive to others' cultural values and beliefs.
- I give credit to others for their work and cite my sources.
- I do not use confidential information for personal benefit.
- I do not represent conflicting or competing interests without full disclosure and the written consent of those involved.
- I do not accept undisclosed gifts or payments for professional services from anyone other than a client or employer.
- I do not guarantee results that are beyond my power to deliver.

If you have any question regarding the ethics of a particular message, these guidelines should serve you well. Betraying the trust of your audience is lethal to effective communication.

PRACTICE QUESTION

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Principles of Ethical Decision Making

After ethical intensity, a thoughtful manager will consider the principles that might apply to an issue. There is no one set of principles to check off, but the seven listed here are common to most people.

- **Legal and regulatory requirements** set the minimum standard for behavior. Any company or individual can disagree with the law, but given the consequences, such disagreement must be done carefully. The Hobby Lobby stores refused, on religious grounds, to follow the Affordable Care Act requirements for certain health benefits. The US Supreme Court found in their favor in 2014.
- **Long-term self-interest** means the pursuit of outcomes that will benefit the self in the long run. For example, a company must make choices to ensure its continued existence. The costs and harm from failure are substantial.
- **Personal virtue** refers to conformity to a standard of righteousness. You should make choices that are honest and truthful individually. The good of the company does not justify lying.
- **Utilitarianism** seeks the greatest benefit for the maximum number of people. This is often difficult to judge over large groups of people.

- **Individual rights** are related to the freedom to act and think without punishment through regulatory, legal, or societal means. For example, we make individual health decisions to smoke or drink beverages loaded with sugar even though the health costs are borne by many through private and government insurance programs.
- **Distributive justice** is the fairness of the outcomes. That is, how are the benefits shared or distributed among the individuals in a group? The US market system can have winner-take-all outcomes. Our welfare system redistributes a little to the losers in the market game who are also part of our society.
- **Religious injunction** is the main moral and ethical guide for many people.

Watch the following video for an overview of the ethical decision making process:

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Being Ethical Online

> If it says so online, it must be true!

That's the joke of researching and reporting facts you find on the internet. If you believe everything you see out there, then you might believe that the United States has a giant "earthquake gun" and that Bat Boy was an advisor to the Clinton White House. Some of these less-than-subtle fibs are easy to spot and debunk. But other so-called facts aren't as easy to spot and can sneak into our business communications if we're not diligent in our fact checking.

Internet ethics are multi-faceted and far reaching. There are ethics to consider when you post to the internet. There are more ethics to consider when you use information you found on the internet. The internet provides all kinds of opportunity to trip up good communicators and drop them right into the middle of an ethical conundrum. Post information online with caution, and always be skeptical about the information you find there!

Posting

Don't post non-factual information on the internet, and if you do, promptly correct errors. When you post information online on behalf of your business, you owe your co-workers and all your external readers truthful information. When you communicate, you work hard to develop a relationship of trust with your audience, whether they're reading you or listening to you speak. Passing along information that's not trustworthy is damaging to your reputation as much as it's damaging to your message.

Don't post questionable information anonymously. Just because you don't put your name on it doesn't mean you're not responsible for facilitating an incorrect, untruthful message. Again, you're damaging the level of trust you've developed for yourself as well as a reader's trust in the information.

Be careful about sharing proprietary information, information that violates patient confidentiality or attorney-client privilege. We talked a little earlier about how the lines between professional and personal communications are blurring. It's easy to make a mistake and post a picture of yourself and your patient and say, "That kidney transplant has been very successful!" Even if you work for the Cleveland Clinic, that's not appropriate unless you have the correct forms from the patient saying it's okay to release that information. In addition, if you're a lawyer and your client posts something on your Facebook wall about his trial, that's also not terribly ethical. Don't leave it up on your wall. Take it down and contact your client by phone.

PRACTICE QUESTION

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Using Materials from the Internet

Fact check information you pull off the internet. Sources like trusted news magazines and newspapers (e.g., *The New York Times*, *The Economist*, etc.) usually don't publish until their facts have been checked and verified, but if you find information on John Doe's website, you should definitely research that data further. It's your duty to your reader and your company to report data correctly.

Don't take things off the internet and use them as your own. If you do not acquire written material, images or video someone else has posted to the internet in an appropriate manner, you are stealing—and stealing is unethical. Now, there is such a thing as "fair use," which makes it okay to use these materials for the purpose of "criticism, comment, news reporting, teaching (including multiple copies for classroom use), scholarship, or research…" If you fall into one of those categories, you're safe. Otherwise, your use of the material is considered a violation of copyright law. Look for the "creative commons" distinction on images and video to confirm that it's appropriate for shared use. We'll talk more about the use of visuals in Module 5: Visual Media.

STAYING CONNECTED

What you'll learn to do: Discuss the importance of staying connected with colleagues, other professionals and customers in the digital age

Now that we understand the tools and the processes by which we connect with other human beings—that is, the social communication model and the methods of communication—we can look at them in terms of this crazy, technological world we live in. Our coworkers, colleagues, and customers are out there waiting to communicate and be communicated with, and they're doing it in a variety of ways that are vastly different than they were twenty years ago.

More times than not, you don't even get to choose the tool you're using to communicate your message, so in this section, we're going to look at the ways you can digitally communicate with colleagues and customers, the strengths and weaknesses of those tools, and how to best leverage them to be understood.

LEARNING OUTCOMES

- Discuss the importance of staying connected with colleagues and other professionals in the digital age
- Discuss the importance of staying connected with customers in the digital age

Connecting with Colleagues and Other Professionals

We live in a technological world, where teams of people can be collaborating and communicating from their respective offices, or even their couches and dining room tables, three thousand miles away from each other. And when you're working from your couch, without the opportunity to chat at the coffee machine or meet up for lunch, you're losing the opportunity to connect meaningfully with other people who have the same business interests, who can provide you with a set of amazing resources to help you succeed, and who look for your input and expertise to help them achieve their own goals.

Staying connected to people is more than just being able to do your job, it's about staying relevant and impactful and maintaining influence in your sphere—which can be hard to do from your dining room table. But conventional communication tools and approaches have been upended in favor of cutting edge digital alternatives that connect co-workers in these new and challenging circumstances. Let's look at some of these tools used to stay digitally connected with coworkers and other colleagues. We'll measure the methods of communication they aid and how well they facilitate the social communication model.

- **Document and work sharing tools:** Sharepoint and OneNote, both Microsoft products, are examples of tools that help you share work documents and collaborate on projects. Sharepoint allows you the ability to build a webpage for your department, house important and frequently used documents, and post basic, one-sided messages that are usually directly related to the content. OneNote performs a similar function but is more project oriented. The platform allows you to upload pictures and web links, create lists and to dos, and more. Neither of these projects allows for conversation, and they aren't meant to stand on their own as communication tools. In fact, because they're offered by Microsoft, usually other programs (like email) are integrated into them.
- **Private messaging and "chat" tools:** Private messaging and instant communication tools, like texting, require that the message be written. These tools allow for good, albeit sometimes slow, communication. The linear portion of communication (speaker–encoding–message–decoding–recipient) is easily facilitated in this method of communication, and "feedback" can be given, but "noise" is a frequent

saboteur and not always easily identified. Why? Because non-verbal communication isn't present, tone of voice is not easily communicated, written messages can be misinterpreted as aggressive, angry and rude when they're not meant to be. Collaborative tools like Slack include a chat component into their platforms, but offer additional components that make communication more effective.

- **Video communication tools:** Skype, Google Hangouts,and Zoom, are examples of video communication tools that allow you to connect with people visually as well as aurally. Whether it's by chat room or simply dialing someone else with an account, you can have a decent conversation with coworkers as if they were in the room with you. The benefits are easy to see—not only is there the ability for verbal and listening communication, but nonverbal communication is apparent as well. Where a disembodied voice might agree to a decision, a video conference participant might send the non-verbal signal that she is not happy with the ending result. The visual bonus allows for heightened feedback in the social communication model, and the ability to clarify when noise exists. (See Module 9 for a lot more on video communication tools.)

You can communicate more effectively when you understand the strengths and pitfalls of these digital communication tools. Tools that facilitate multiple types of communication (verbal, listening, non-verbal) and allow the completion of the social communication model's circuit are more likely to aid you in getting your message across to your audience.

PRACTICE QUESTION

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Connecting with Customers

Just as technology allows you to have a team of coworkers spread across the country or even the world, so does it allow for your customers to more easily access the products and services you offer. Staying connected with them is tantamount to staying connected with the team that helps you deliver those products and services.

Customers are looking for and using any of a number of methods of communication to interact with the brands, products and services they care about. In the age of social media, they're demanding conversation and human interaction. Digital communication tools can provide those avenues, but they also need to facilitate various methods of communication and complete the social communication model's circuit if they're going to be effective.

Let's take a look at what's out there.

- **Project and document sharing tools:** These tools exist to help support your side of the conversation. Tools like Microsoft's Delve allow you to pull up all your documents and information by contact. Have a meeting with the XYZ Widget Company? Delve allows you to access all of your recent documents, show you records of past conversations and so on. This digital tool supports your communication with a customer, but it doesn't take you past the "message" part on the social communication model. Still, they're handy tools to use when preparing to communicate.
- **Websites:** Almost every company has one to provide their customers with information about their products and services, as well as how to contact the company. Usually they feature information they're legally required to supply, like annual reports and financial filings. Your company's web design communicates your brand promise and personality, but a website on its own is a one-sided form of communication. It's the digital equivalent of "hanging out your shingle" and doesn't provide any opportunity for feedback from its viewers.
- **Blogging and Social Media:** This is a passive form of communication to your customers, one-sided and allowing for almost minimal feedback. That aside, blogging and social media allow you to communicate new products and information to your customers and establish that all-important "personality" customers are looking for in companies today.
- **Private message and "chat" tools:** Tools like Live Chat and Kayako have taken the customer service world by storm. When visiting a company's website, customers have come to expect that there will be some sort of chat option to talk with a customer service representative. These programs allow for canned

conversational openings and encourage visitors to the website to have a discussion with a company representative where one might not have otherwise occurred. Nonverbal communication is nonexistent in this platform, so "noise" is almost a given, but feedback can be collected, closing the social communication model's circuit.
- **Video chat:** There's a short list of companies that are employing video chat tools to deal with customer service matters, and doing so with great success. It's the next best thing to a face to face conversation and provides the communicators access to all methods of communication. The social communication model is easily closed with feedback on noise, and active listeners can take non-verbal cues into consideration. The same holds true for this tool where more robust relationships with customers are the foundation of the business—lawyers, teachers, and therapists are among the many professionals who rely on careful face-to-face communication to perform their jobs effectively, and this type of communication can definitely facilitate that.

PRACTICE QUESTION

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Digital communication tools can be effective, and the more methods of communication they allow, the better they can close the social communication model's circuit, the better they are. Choose your digital tool wisely and leverage its features so that you can most clearly, concisely, and objectively convey your message.

PUTTING IT TOGETHER: COMMUNICATING IN BUSINESS

We've learned that there are seven principles by which you should evaluate any communication, be it verbal or written:

- Clear
- Concise
- Objective
- Consistent
- Complete
- Relevant
- Understanding of Audience Knowledge

If you adhere to these principles, you have a far better chance of being understood by your audience.

We've also learned about the social communication model. Through that, we learned that you create the message in your head and "encode it" into a message that can be understood, and then your audience "decodes" it to receive the message. In that process, there can be disruptive "noise" that distorts your message, but your audience can provide "feedback" that allows you additional chances to be understood.

We learned that there are types of communication—written, yes, but also spoken. And with spoken communication, verbal, listening and non-verbal communication are all taking place at the same time. Finding communication methods and tools that allow you to employ all three of those methods are the most efficient ways to good communication.

Finally, we considered ethical communication and how keeping these principles and laws of communication in mind can keep you on the straight and narrow path to ethical communication.

You're on your way to being a great communicator!

MODULE 2: WRITING IN BUSINESS

WHY IT MATTERS: WRITING IN BUSINESS

“Oh my gosh, what a disaster!” Dennis thought. Dennis had been placed in charge of booking a speaker for his office’s diversity event, and the major speaker from Diversity NOW hadn’t shown up. He was now scrambling to figure out what may have gone wrong, all under the watchful eye of his boss, Carmen.

As Dennis checked his email, he found that he had, in fact, reached out to Rennata, the speaker he had booked:

> Date: 4/2/18
>
> To: Rennata Johnson, CEO of Diversity NOW <rjohnson@diversitynow.com>
>
> From: Dennis Hoffman <shoffman@qcom.com>
>
> Re: Diversity Day
>
> I am Dennis Hoffman and my boss, Carmen Jacobson, asked me to get a hold of you about Diversity day later in this month. You may or may not know that our company is working on a proactive stance about diversity in the workplace. Last year we put on sessions and skits ourselves. Several employees enjoyed the day but did not seem to fully appreciate the implications for the work day. We are so thankful that you agreed to help out since you are a formal outsider. We’re going to set aside the entire day of April 23. The first session starts at 9 a.m. There will be lunch and a the late afternoon session goes only until 3:00 p.m. The brochures need to be published by one week prior to that date. See you then!
>
> Dennis

Dennis suddenly realizes that Rennata never sent a response back—confirming or otherwise. He thinks to himself, “Yes, I probably should have remembered to check to see if Rennata had sent the title for her talk back in time. I did get a bit busy and forget that. But how could Carmen think the rest of this was my fault?”

In this module, we’ll discuss the importance of writing—and discuss appropriate ways to write—in business. Look back at Dennis’s email; can you see areas where he might have improved email? Let’s dive in and learn the skills you need to ensure a much better outcome in your work.

WRITING THE RIGHT MESSAGE

What you'll learn to do: Write a business communication given a specific audience and purpose

In business, being requested to write a business communication of some type can feel like "one more work assignment." It is tempting to quickly jot and send that email or letter. However, by doing so, employees may miss the opportunity to help their company do more–and miss the opportunity for advancement. Crafting messages correctly is perhaps the single best way to polish your company's and your own image.

Focusing the communication effort on the message's receiver results in business objectives quickly achieved, and growing writer credibility. The results are subtle but the impact is large.

This section begins with two keys to success in business communication: audience and purpose.

WATCH IT

The following video introduces a different business communication's course, but the content is common to all courses.

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LEARNING OUTCOMES

- Explain the importance of audience to business communication
- Discuss the importance of writing a clear and focused message in business
- Differentiate between types for writing positive, negative, and persuasive messages

Audience

The purpose of communication is to have the sender’s idea in mind reach the receiver’s mind with identical understanding.

Yet, communicating is not as simple and transparent as the image below suggests. Communication is surrounded by potential pitfalls and myriad opportunities for the main point to be lost or altered. Let’s take a look at Figure 1 to see a diagram of a communication system.

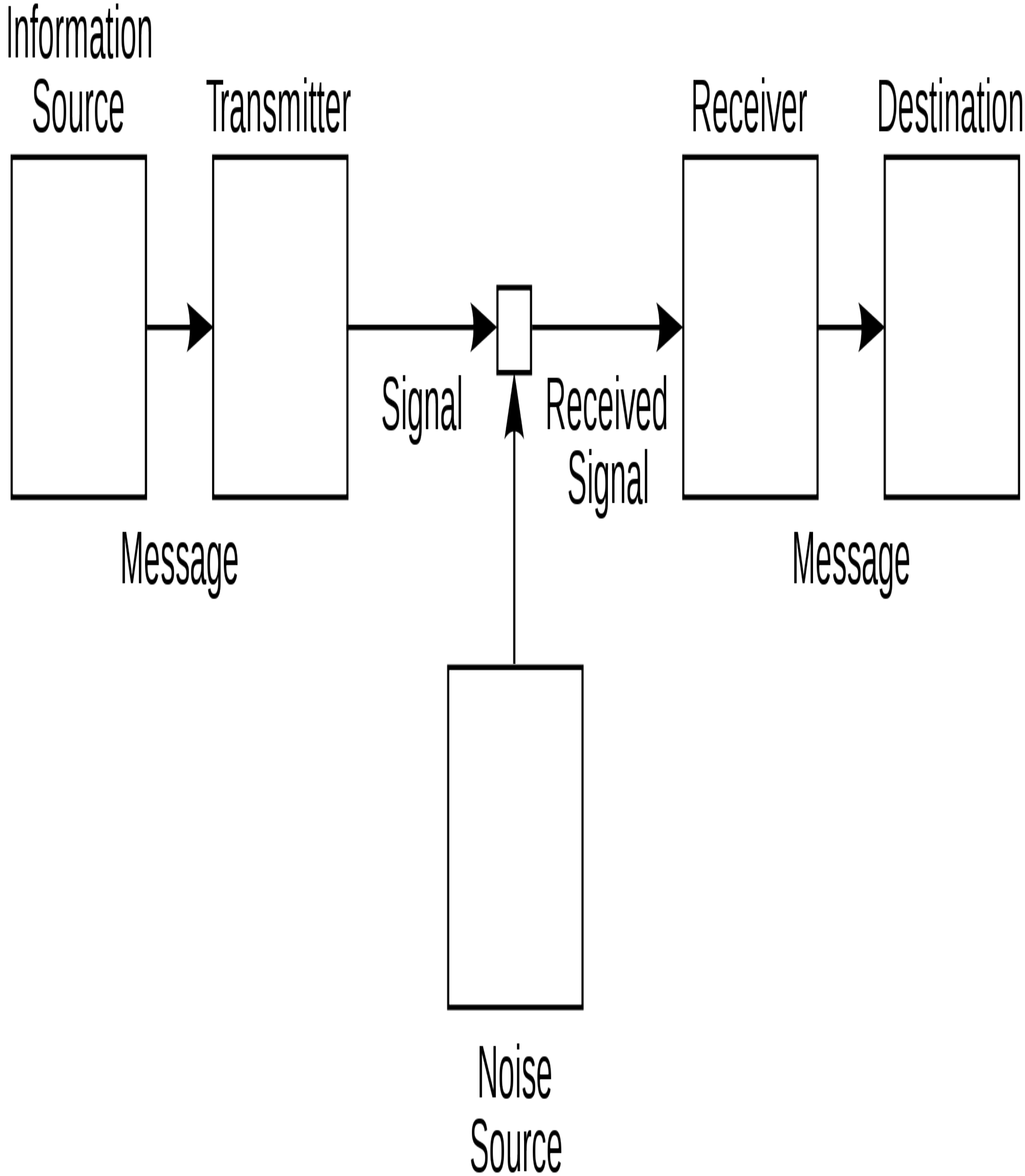

Figure 1. Shannon's diagram of a general communication system.

Perhaps you are surprised to realize there is more than one audience for a message. There is the primary audience or receiver of the communication: this is the direct audience, who we'll focus on in this module. In Module 6: Reports, we'll also discuss indirect or remote audiences; these others include those who may see the communication even if they are not intended as a target of the communication. In this module, the direct audience is the focus. A good communicator is mindful of the other potential audiences when they start writing since doing so can help advance the company and advance a career.

The direct audience is the receiver of the business communication. This person or group of people might be internal or external to the sender's organization. The relationship to the organization may impact the formality of the wording and the candor of the message. When new to business writing, be sure to check the tone with appropriate staff.

PRACTICE QUESTION

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Tone varies based on the power relationship of the sender to the receiver. The audience may be in one of three power positions relative to the sender summarized by the labels **upward**, **downward**, or **horizontal** communication.

Downward and Upward Communication

Downward communication flows from the managerial and executive levels to the staff through formal channels such as policy manuals, rules and regulations and organizational charts. Upward communication is initiated by staff and directed at executives; it frequently takes the form of a complaint or a request. Horizontal communication occurs when colleagues meet to discuss issues of common interest, resolve problems and share information.

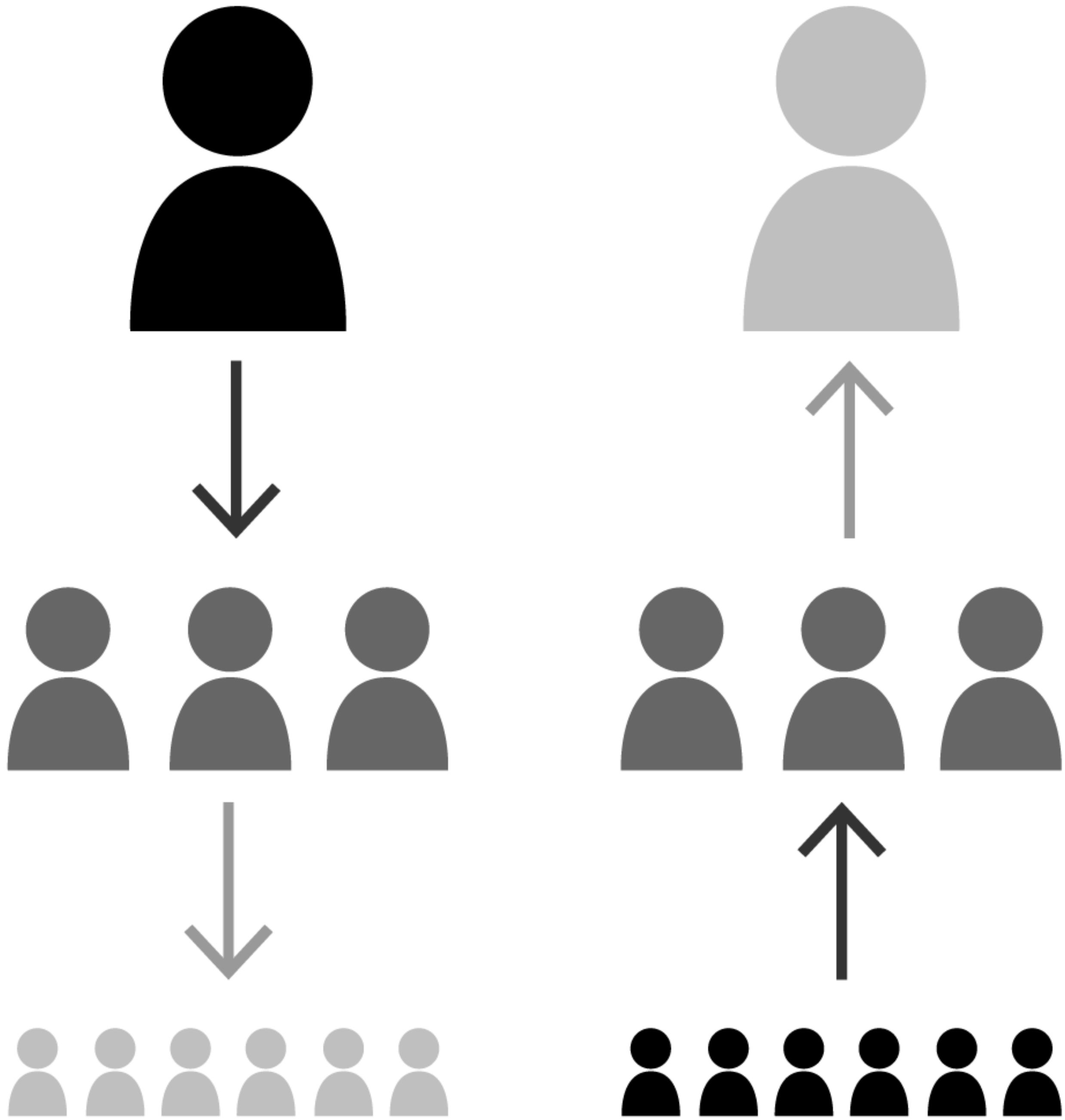


Figure 2. Upwards and downwards communication

Horizontal Communication

When the flow of information is from peers in an organizational level to one or more of similar rank it is called horizontal communication.

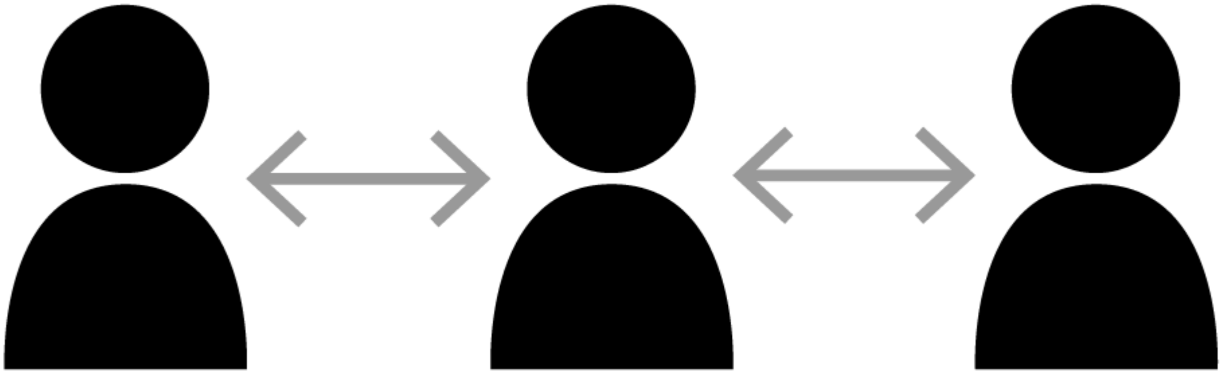


Figure 3. Horizontal communication

This form of communication helps employees express information and ideas as well as coordinating the organization's work.

TALKING ACROSS DIFFERENT LEVELS

Direction and purpose	You should say . . .	You shouldn't say . . .	Why?
Upward communication: an employee emailing the boss to request a day off	"Mr Sanchez, may I have Friday off?"	"Mr Sanchez, I'm going to take Friday off. Ok?"	Deferential (formal title) and request rather than statement or demand
Downward communication: a manager emailing his work team to let them know he is off on Friday.	"Team, I'm out of the office Friday. Please hold any issues until Monday."	"Team, do you mind if I take Friday off?"	Tone of authority not permissive.
Horizontal communication: an employee letting co-workers know about an upcoming vacation day.	"Hi all. I'll be out on Friday. Can you handle anything that comes in or take a message for Monday?"	"I won't be in tomorrow."	Tone is peer to peer compared to the other samples. Be sure to include any information about potential coverage your peers may need to complete while you're gone.

Notice in each of the three sample messages that even in their few words, knowing the upward, downward or horizontal position of the receiver impacted the tone and phrasing of the message.

The Right Message

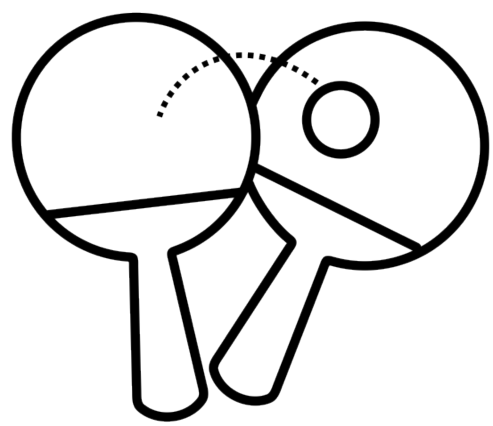
Most have heard the phrase "everything but the kitchen sink" which describes a situation in which almost nothing is left out. This phrase can easily be used when the intended communication has included far too much information. We live in a fast-paced world, so getting to the point is a valued time-saver. Having someone explain how to build a watch on the way to answering the question, "What time is it?" clearly demonstrates a speaker who has lost track of the primary purpose of the communication.

Here is an all-too-common example of the irritation and time that is lost in business communications when a purpose is not established.

> Date: 7/2/17
>
> To: Julie Johnson <jjohnson@buildathing.com>
>
> From: Suri Tanaka <stanaka@goodhomesremodel.com>
>
> Re: Remodel Project
>
> Management is really pleased with the progress made on the remodel. There were four employee focus group meetings held and two meetings with the architects. Just last week, the architects brought back the layouts for the back offices and employee break room.
>
> This new drawing included couches, kitchen facilities and many outlets to recharge electronics. Can you each provide some feedback on this design? With some of the ergonomic furniture choices, the project started to look like it would be exceeding the budget by 10 percent.
>
> Management needs employee feedback on areas where some of the improvements could be delayed.
>
> Best,
>
> Suri

Judging from the first sentence of the message, this email is a report on the status of the remodel. It is easy to set this message aside if it is a busy day (or week!). Looking more closely, it becomes apparent this is not a status message, but a request for input. When creating business message the writer must narrow the communication and organize the communication to highlight the primary purpose. Let the receiver know what is expected of the him or her early in the message.

You may be asking, "What does purpose of a business communication mean?" The answer is that the primary purpose of every business communication is to deliver information clearly and efficiently. Clear communication ensures the receiver understands the intended message. Efficient communication ensures the message is communicated quickly without a lot of ping-ponging back and forth. For example, imagine someone sends out a message about the team meeting next week on Tuesday in the main conference room but forgets the time of the meeting. A flurry of messages then fly back and forth, filling everyone's inboxes.



In a less obvious manner, this ping-pong of communications comes when the initial message invites a response but does not show consideration of the user because it omits needed background. "Management decided to hold the company picnic on Tuesday May 13 at the Southside park. Please bring…." This message generates a flurry of emails about "Who will be the back-up staying in the office?" and "What happens in case of rain?" It is likely the sender has the answers to all these questions but did not think about how the receiver(s) might need to know this as well.

In order to avoiding the ping-pong of communication you must ensure these two things:

- The sender's idea is clearly received by the audience
- The communication provides just what the receiver needs to know: not too much and not too little

PRACTICE QUESTION

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Positive, Negative, and Persuasive Messages

All business messages fit across to two broad categories with an overlapping third category. There are communications where the receiver is expected to have a positive or neutral reaction, and there are communications about which receivers may have a more negative reaction. The image of the continuum below is focused on audience reaction to a message.

We'll discuss exactly how to write these messages later in this module when we discuss the three-part writing process. For now we'll focus on how to determine which type of message fits your audience.

Positive Messages

Positive messages include messages where the audience is expected to react in a neutral to positive manner. Positive messages tend to consist of routine or good news. These messages might be items such as congratulations, confirmations, directions, simple credit requests, or credit approvals. Also included in this category might be denials that are somewhat routine or expected. This could be something like a parking lot closure that inconveniences employees, but in a minor way. As strange as this sounds, sympathy messages are in this category as well. Sympathy messages are routine since they will not be a surprise to the receiver.

Consider the message to be a positive message structure when:

- The receiver likes or expects this news (product shipped on time)
- The receiver needs little education or background to understand the news (travel arrangement for the conference)
- The receiver considers the message routine, even if not completely positive (parking lot closed for three days for new striping)

Negative Messages

Negative messages include messages where the audience is expected to react in a negative manner. Negative messages consist of bad news. In these messages, the sender's goal is to convey the bad news in a manner that preserves the business relationship. While the sender must deliver bad news, the sender wants to avoid an employee quitting or a customer finding another vendor. These messages might be items such as refusal to provide a refund, cancellation of an event, inability to support an event and more.

Consider the message to be a negative communication when:

- The receiver may be displeased (cost for repair is the receiver's, not the utility company's)
- The receiver needs a little persuasion (new log-on procedure takes longer but is more secure)
- The receiver may be somewhat uncomfortable (new badging system underway because employees have been sharing badges)

Persuasive Messages

The third, overlapping category is persuasive messages. With this category, the audience is expected to need encouragement in order to act as the sender desires. In some cases, the receiver is more like a positive audience; for example, when you're asking for a recommendation letter or when you're inviting someone to attend an after-hours work function. In other cases, the receiver is more like a negative audience; for example, when you're requesting additional payment as a result of a shared error or when you're providing an extension to an impending due date.

Consider the message a persuasive communication when:

- The receiver may be reluctant (please speak to the new employee group)
- The receiver is being asked a favor (please write recommendation letter)
- The receiver may be invited to something somewhat outside regular duties (please supervise a new book club that will meet on campus after work)

PRACTICE QUESTIONS

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WORD CHOICE AND TONE

What you'll learn to do: Discuss the impact that word choice and tone can have on a business message

Have you ever heard the phrase, "don't shoot the messenger" when someone is blaming the bearer of bad news for the upset? This common metaphoric phrase dates back to before the widespread use of modern telecommunication when messages were usually delivered by human envoys. For example, during a war, a messenger would be sent from one camp to another. If the message was distressing or described a severe misfortune, the receivers might blame the messenger for such bad news and take their anger out on the unfortunate messenger.

The organization, word choice, and tone of your message allows the communication to be received and understood while maintaining a positive business relationship. This keeps the modern day messenger (or email sender) from being shot (or fired) all while maintaining good business relationships. With proper wording and phrasing, your communications can enhance your reputation and the reputation of your business.

LEARNING OUTCOMES

- Discuss strategies for creating reader-focused writing
- Discuss strategies to avoid language that can confuse or exclude readers
- Discuss strategies to avoid language that shows bias against individuals or populations
- Discuss strategies to improve concision in writing
- Discuss strategies to improve clarity in writing
- Evaluate the parallel structure of sentences and passages
- Discuss appropriate ways to indicate emphasis in business writing

Writing for the Reader

The audience (your reader, if the message is written) is the receiver of the business communication. This model focuses on the choices a writer or sender of a message can make to best convey their message to the receiver. If all choices are related to considering the receiver's needs over those of the sender, the message is more likely to achieve its purpose quickly.

To understand this concept, think about learning to change a tire. One way people could learn about changing a tire is from a description in the owner's manual sent by the auto manufacturer. Many individuals, on the other hand, have learned from watching or participating in the process—gaining hands-on experience. Which is easier? For the manufacturer (sender) the information is easy and cheap to print. For the tire changer (receiver) a personal assistant is easier, but more expensive. The sender needs to find the best balance.

Or, think about a clothes washing machine. The manuals tend to be printed on inexpensive paper and the grayscale images depict the controls. Some companies have decided to include instructional DVDs that demonstrate the controls. Which of these examples is more focused on the receiver? Which is more effective? Put the receiver first.

WATCH IT

Please view this nine minute video about the impact and power in focusing on the audience. In this module, this concept is called **you-view**.

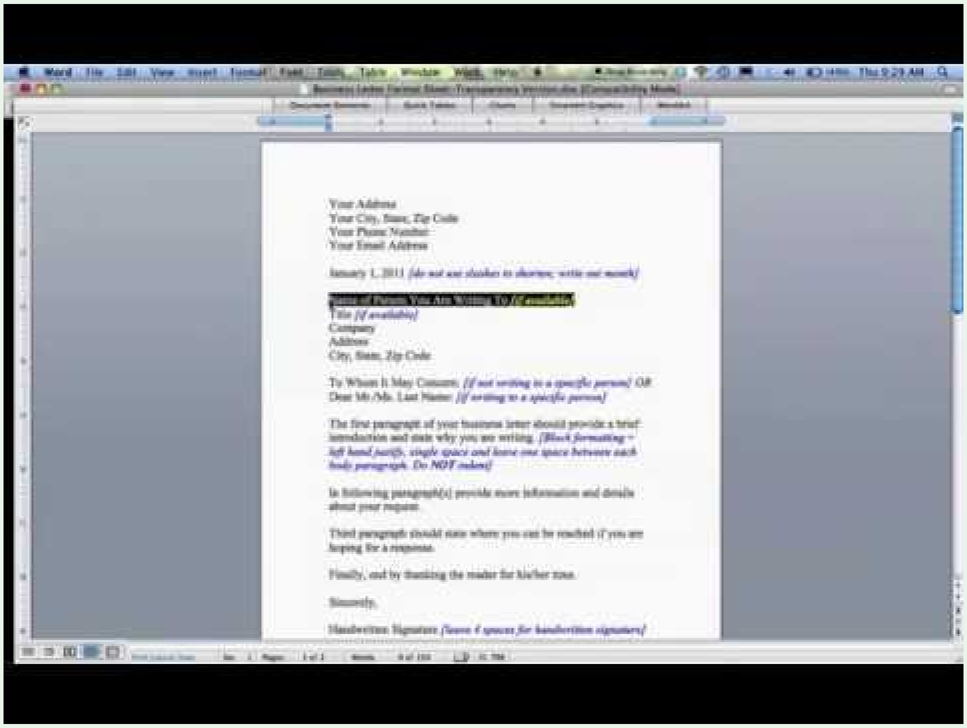
You-view, or putting the reader first, encompasses two skills:

1. Put the receiver's needs before the sender's needs
2. Start with what the receiver needs to know

FINDING A LOST SHIPMENT

Lynnette has worked hard to find a lost shipment. She finally has enough information to email the customer and provide an update on the situation. She begins writing up her draft: "You won't believe how many people I had to contact to find this for you. I had to call Texas, send a copy to Dallas, and then….." Stop! It is likely Lynnette is thinking the customer will be impressed with her efforts and feel like a valued customer. However, nothing in this email so far has answered the customer's primary need.

Let's rewind and imagine Lynnette wrote her initial draft focusing on getting the customer's primary need instead: "I have found your product at the Texas depot, and I have scheduled delivery for March 30." Lynette is satisfied with this draft: it is direct and delivers the needed information. However, the email does not take the you-view.



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Notice how she talks about herself first with the use of personal pronoun "I"? In a subtle, but important improvement, Lynette should write, "Your product is scheduled for delivery March 30. Your product was in the Texas depot." While both versions of the email let the customer know the product's delivery information, the second version places emphasis on the customer and makes the customer most important.

PRACTICE QUESTION

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Language as an Obstacle

Each of us has a variety of ways of speaking and writing depending on circumstances. You write a thank-you note to your aunt for the socks she sent much differently than you write a thank-you note after a job interview with the vice president of the division. In business communication, the key is to choose language that is direct and easy for your audience to understand.

When you're writing, it's important to consider your audience's understanding compared to your own. For example, if you're writing a newsletter for customers, you would use much different language than you would if you were writing a product status update to the engineers who initially created the product.

As you write, keep your eye out for these common language challenges:

- Clichés
- Jargon
- Slang
- Euphemisms
- Doublespeak

Cliché

Clichés that we use in everyday conversation (*green with envy*, *face the music*, *add insult to injury*, etc.) can make your writing sound boring. Merriam-Webster's dictionary defines a cliché as "a trite phrase or expression; a hackneyed theme, characterization, or situation; something (such as a menu item) that has become overly familiar or commonplace." (Note: Merriam-Webster "Cliché." *Merriam-Webster.com*. n.d. Web. 12 June 2018.)

AVOIDING CLICHÉS

Consider the paragraph and revision below.

Original Paragraph

When I started thinking about getting a new job, I was completely clueless. I knew I wanted to do something really cool, but I was lost about what might fit the bill.

Revised Paragraph

When I started thinking about getting a new job, I was overwhelmed by my options and unsure of what to choose. While I knew I wanted to do something interesting, I was uncertain of what that might be.

Avoid	Try	Why
Please resolve this ASAP.	Please resolve this by March 30.	ASAP is not a time we each understand the same way. You might be thinking you will get a call back tomorrow. I might be thinking this research and forms needed will take a week, so seven days is sufficient.
Thanks for your help. Now just kick it through the goal posts.	Thanks for your help. Now you just need to finish submitting the paperwork to process the deal.	"Kick it through the goals posts" is common enough, and overused enough, but it is a sport reference that many may not understand. It is not clear what step must be taken next.

Jargon

The dictionary defines jargon as "the technical terminology or characteristic idiom of a special activity or group." (Note: Merriam-Webster, "Jargon." *Merriam-Webster.com*. n.d. Web. 12 June 2018.) Since these terms are used within an activity, group, or profession, they're typically not well understood outside that context. Within the context of a specific group, jargon may help members of the group refer to very specialized concepts, but those outside the group may find the jargon incomprehensible or may misunderstand the intended meaning.

For example, plumbers might use terms like *elbow*, *ABS*, *sweating the pipes*, *reducer*, *flapper, snake*, and *rough-in*. Other plumbers will understand those terms in the context of plumbing, but to non-plumbers, those terms may have different meanings or be entirely nonsensical.

Always keep your audience in mind. If you are addressing only members of a specialized field, using field-specific jargon will signal to your audience that you are also a member of the field and may allow you to talk about higher or specific concepts. However, if you are speaking to a broader group with no specialized knowledge, using jargon will only alienate or confuse your audience. If some technical terms are absolutely necessary when speaking to an audience, be sure to explain each term and its context.

For example, if you are writing a department-wide memo, it would be acceptable to use terms specific to your company or department. If you are writing a newsletter for customers, however, it would be better to avoid jargon and use broader language.

Avoid	Try	Why
Your help is appreciated.10-4.	Your help is appreciated. I know exactly what do do with the claim now.	10-4 started in police and military circles as a radio shorthand. While many may know that it means of "ok" or "I understand", it is not clear to all outside those circles.
ATM will work well in this situation.	Asynchronous Transfer Mode will work well in this situation.	If the receiver is not from the technical side of communications, someone might have been thinking about a bank machine.

Slang

Avoid slang or idiomatic expressions in formal business writing or in academic writing. Slang and idiomatic expressions make your writing sound informal and less credible. They can also make it harder for non-native English speakers to understand you.

Avoid	Try
That cart did not work any more. It was all jacked up.	That cart did not work any more. It had a broken wheel and bent frame.
She was dead after all that overtime last weekend.	She was exhausted after all that overtime last week.

However, there are occasions when slang and idiomatic expressions may be appropriate, depending on who your audience is. If you are writing informally or humorously, slang and idiomatic language may help you better express yourself.

If you are going to use slang, however, make sure that you're using it correctly. Customers who are "native speakers" of slang (i.e., people who are a part of the demographic you may be targeting by using slang) can very easily spot a marketing professional who doesn't understand the correct usage of a slang term.

Euphemisms and Doublespeak

Euphemisms are words or phrases used to talk about unpleasant or taboo topics in a more polite way. For example, instead of saying that you are leaving a meeting to urinate, you might say that you are "going to the restroom." If you are talking about a person who just died, you might say that the person has "passed away."

Doublespeak is a more deliberate form of euphemism that disguises the meaning of words so that the idea the words represent seems less unpleasant. For example, the act of terminating employment for many people at once may be referred to in doublespeak as *downsizing* or *right-sizing,* or a government dropping bombs might say it is *servicing the target*. Doublespeak language is usually used in bureaucracies and politics and should be avoided whenever possible. In business writing (and all writing), you should avoid using doublespeak.

In business writing, your purpose should not be to hide meaning but to communicate clearly.

Avoid	Try
The department is being right-sized. There is a meeting for the entire staff next Friday.	There will be layoffs in that department. There is a meeting for the entire staff next Friday.
The month-end income statement showed a negative cash flow.	The month-end income statement showed a loss.

PRACTICE QUESTION

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Bias Free Writing

Why does the topic of bias-free writing follow a page about hidden meaning? Business writers work to be clear and direct in meaning, and drawing attention to details about race, age, country of origin, disability, and gender in the workplace might cause conscious or unconscious bias.

Let's look at some examples and ways to fix them. A simple rule for bias-free writing is to consider whether personal details need to be included to get the point across.

Avoid	Try
Franklin is the new African-American accountant.	Franklin is the new accountant.
For someone nearing retirement, she caught on to that new software quickly.	She caught on to that new software quickly.
Abdul has some of the highest call center ratings, even though his Saudi accent is strong.	Abdul has some of the highest call center ratings.
John is one of our most active employees, even though he must use a wheelchair.	John is one of our most active employees.
Did the cleaning woman bring new trash bags?	Did the cleaner bring new trash bags?
Do we have enough manpower to finish this project?	Do we have enough workforce to finish this project?

Avoiding Gender Bias

Writing in a non-sexist way requires the ability to recognize sexism in the first place. The next hurdle is to figure out a way to eliminate any inherent sexism without disrupting the flow of the piece. Here are a few techniques to help avoid bias.

Gendered Nouns

The first way to avoid gender bias in your writing is to use gender-neutral words when referring individuals in various positions:

Avoid	Try
businessman, businesswoman	business executive
chairman, chairwoman	chairperson
the common man	the average person
salesman, saleswoman	salesperson, sales clerk, marketer

Gendered Pronouns

The next thing to be aware of is your use of gendered pronouns. While some still use *he* as a generic pronoun, this shows a strong bias towards male individuals. Instead you can use "he or she" ("his or her," etc) as the pronoun for a generic noun:

Avoid	Try
Every employee should file his report by the end of the day.	Every employee should file his or her report by the end of the day.
When filing the report, each employee should make sure he included yesterday's data.	When filing the report, each employee should make sure he or she included yesterday's data.

Using "he or she" is an okay solution, but it can get clunky in large doses: "Every employee should check with his or her supervisor that his or her report was properly filed." Additionally, many individuals neither identify as male nor female and use *they* as a singular pronoun to refer to themselves. Thus, using "he or she" is often not the best solution. The best solution is often to rephrase the sentence to have a plural subject instead of a singular subject.

Avoid	Try
Every employee should file his report by the end of the day.	All employees should file their reports by the end of the day.
When filing the report, each employee should make sure he or she included yesterday's data.	When filing the report, employees should make sure they included yesterday's data.
Any author knows that his first draft of a piece won't be good.	All authors know that their first drafts won't be good.

SINGULAR *THEY*

While *they* is typically treated as a plural pronoun, when an individual has expressed a desire to be identified with gender-neutral pronouns (*they*/*their*/*theirs*), it *is* grammatically correct to use *they* as a singular pronoun (per the *Chicago Manual of Style*, one of the predominant authorities on grammar and style). (Note: The University of Chicago Press. "Grammar & Usage: Singular 'they'. *Chicago Manual of Style*, 2017, p. 241.)

There are occasions, however, where you can't simply make the sentence plural. For example, let's look at this sentence: "Someone will call you to further discuss the issue. He or she will call between 9:00 and 10:00 tomorrow morning." Only one person will be making the call, so we can't make this sentence plural. In this situation, the solution may be to completely omit the pronoun: "Someone will call you to further discuss the issue. You can expect the call between 9:00 and 10:00 tomorrow morning."

Avoiding Race and Ethnicity Bias

When speaking about a racial or ethnic group, deciding which term to use can be a tricky subject because the ascribed meaning to particular terms and labels can frequently change. When choosing between terms to refer to a group, it is best to ask a member of that group what they prefer.

As a general rule in a business setting, do not mention a person's race or ethnicity unless it is directly relevant to the situation.

Avoiding Disability Bias

As a general rule, avoid using labeled nouns when talking about people with disabilities. Try to use emotionally neutral expressions rather than ones that assign a role, such as *victim*.

Avoid	Try
the disabled	the people with disabilities
the schizophrenic	the person diagnosed with schizophrenia
an AIDS victim	a person with AIDS
a person suffering from epilepsy	a person with epilepsy

PRACTICE QUESTION

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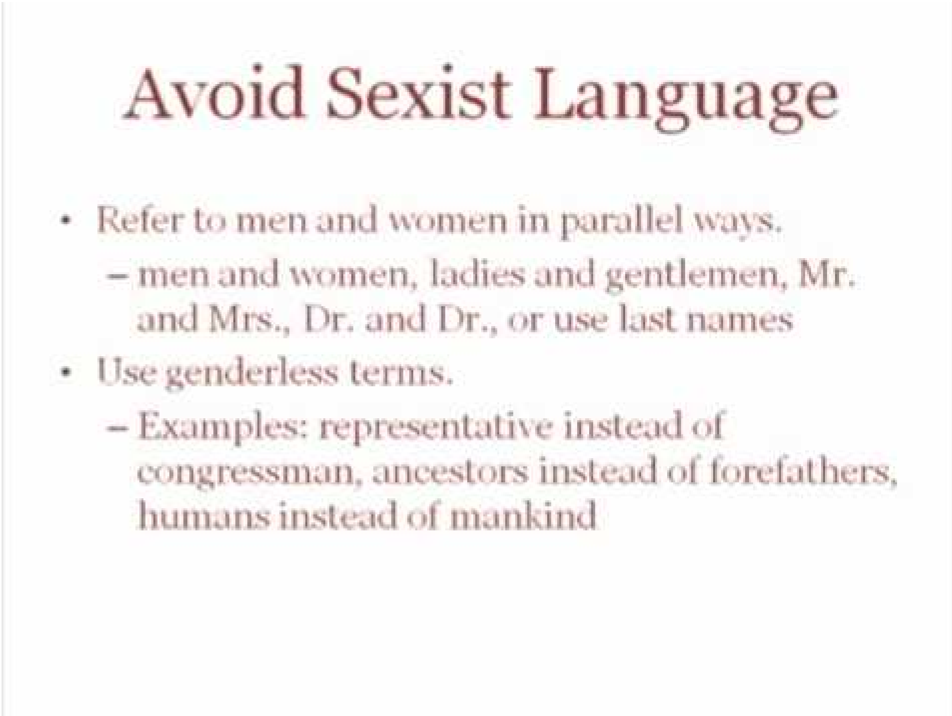

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Concise Writing

At the heart of business is the idea that "time is money." This may lead you to believe that shorter messages are always better; however, concise writing is not just fast or short; it is writing that balances the clarity of the message with efficiency.

PRACTICE QUESTION

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Sentence Length and Complexity

With business writing, the main focus is on the reader's ability to quickly absorb and react to the communication. Concise business writing uses clean, straightforward sentence structure to improve understanding and retention. This is different from the prose of novels or the beat of poetry in which taking pleasure in the complexity of sentences is part of the experience. Business writing uses simpler sentences to be more concise and thus less likely to be misinterpreted.

STRAIGHTFORWARD SENTENCES

Grammatically, there are three kinds of sentences. It's not especially important for you to be able to identify them in order to be a good business writer. However, taking a moment to think about how they work and what they do will help you become more concise and clear.

Simple sentences consist of a single independent clause:

Fido fetched. *[A noun and a verb is all it takes to make a simple sentence.]*

Whiskers ate her tuna. *[This adds a direct object, "tuna," but it's still a simple sentence.]*

Polly sat on her perch and whistled. *[This includes a prepositional phrase, "on her perch," and a compound verb "sat" and "whistled," but it's still a simple sentence.]*

Compound sentences consist of two (or more, but that's tricky) independent clauses attached by a comma and a conjunction:

Amanita threw the ball, and Fido fetched it. *["Amanita threw the ball" could stand alone as a sentence, as could "Fido fetched it." That structure is what makes this a compound sentence.]*

Complex sentences consist of at least one dependent clause followed by at least one independent clause:

While Amanita looked for the ball, Fido chased a grasshopper. *[Even though the part of the sentence before the comma has a subject, "Amanita," and a verb "looked," the addition of "while" means it can't stand on it's own as a sentence. "Fido chased a grasshopper" can stand alone, so it is an independent clause.]*

Compound-complex sentences — you can probably figure this one out from the name and the example:

While Amanita looked for the ball, Fido chased a grasshopper, and Whiskers looked bored.

So, Why Does This Matter?

Using compound and complex sentences is great! However, be sure you are not splicing together long strings of clauses that get really hard to follow. Additionally, you should vary your sentence types for more engaging reading.

In order to write straightforward sentences that are appropriate and effective in business communication, there are a few things to keep in mind.

- Be careful not to string together too many ideas in the same sentence. A sentence like this is not only confusing, it also becomes really boring to read and doesn't sound very sophisticated:
    - **Michael copy edited the report, and the data tables were compiled, and the graphics looked wonderful.**
        - All three of these activities are part of the completion of a report, but they don't really belong in the same sentence.
    - **Michael copy edited the report while the rest of the team compiled the data tables. The graphics looked wonderful.**
        - By using a connector other than *and*—in this case, *while*—the sentence actually gives more information: that the copy editing and compiling happened at the same time. If you substitute "after which" for "while," you're actually telling a somewhat different story. Also, it's great that the graphics are impressive, but that idea doesn't belong in the same sentence.
- Starting a sentence with a dependent clause can sometimes bury the important news at the back end of the sentence. It's not forbidden to begin with dependent clauses, but be very careful about when you choose to do so. Think about the emotions a reader goes through when faced with a sentence like this:
    - **While we suffered a dismal first quarter because of supply-chain issues, and our stock price wobbled a lot thanks to fluctuations in the Japanese market that caused the company to begin targeting employees for layoffs, the executive team is happy to report that we are on track for a profitable year.**
        - That sentence is almost cruel in the amount of anxiety a reader has to suffer before getting to the good news. The whole point of that sentence is that the company is doing well. Yay! Therefore, the sentence should start with the important part.

    - **The executive team is happy to report that we are on track for a profitable year, even though we suffered . . .**
        - There's a whole different response when the sentence tells the important news first.
- Clear is good; simple can be mind-numbing, so vary your sentence structures. Imagine an entire report full of this:
    - **Profits were up. This is good. Production increased by six percent. Employees received bonuses in two of four quarters. The stock split.**
        - Even though you are reading excellent news, you're about to keel over from the monotony, aren't you? Writing cleanly and concisely doesn't mean writing like a robot. Think about how the small nuggets of information relate to one another, and combine them in sentences that a) make sense, b) put the important news first, and c) show that you take pride in writing well.
    - **We are happy to report that profits are up, and our shares have split. This results from a six-percent increase in production, and we were happy to reward our hard-working employees with bonuses in two of four quarters.**
        - Not only is it possible to read this passage without dozing off, it also gives more information by showing the relationship among the bits of information given.

Finally, watch your wordiness. As you write and edit, ask yourself whether you are using several words when there's one perfectly good one that would suffice. At the same time, be careful of turning a single sentence into a paragraph by stringing together every idea you've ever had. Findings from Goddard (1989) suggest that sentence length is related to reader comprehension. This research suggests that between 20 and 25 words is the maximum for solid comprehension. Remember, your goal is not to make your sentences short, your goal is to convey your ideas clearly and to avoid ambiguity. That said, the more complex the material you are discussing, the more straightforward and clean your sentences need to be. (Note: http://sites.utexas.edu/legalwriting/2015/04/29/manage-your-sentence-length-2/)

Sentence Length	Comprehension Rate
8 words	100%
15 words	90%
19 words	80%
28 words	50%

Remember, your goal is not to make your sentences short, your goal is to convey your ideas clearly and to avoid ambiguity, and you can do this by writing sentences with simple sentence structure.

Avoid	Try	Why
I am writing to tell you that the cat ate the mouse.	The cat ate the mouse.	Isn't it obvious that "I am writing"? How else would the reader see this?
At this point in time, you need to complete a new application.	You need to complete a new application.	What other time period could we be in?
In a very few cases, the amount was refunded.	Rarely was the amount refunded.	Why use a whole phrase when a single word is right to the point?

Be careful not to repeat yourself over and over and over.

Avoid	Try
It is **absolutely essential** that we clear these lines of customers quickly.	We have to clear these lines of customers quickly.
Those two items are **exactly identical,** except for the price tag we added.	Those two items are identical, except for the price tag we added.
It's a **true fact** that she was late again.	It's true she was late again. *(Even better in most cases:)* She was late again.

Finally, become aware of your own bad habits. Do you use "also" too much to show the relationship between ideas? Do you adore the complex sentence type a little too strongly? Do you use "one" (as in "One hopes to understand the meaning of this sentence.") and then get stuck in a bog of pronouns? Do you start sentences with "What it is, is . . . " Whatever your particular quirks, become aware of them and take care to look for and fix them when you edit your work.

LEARN MORE

For more useful information on how sentences work, and to get some practice in before you start your own writing, check out this reading on Sentence Structure.

Active and Passive Voice

You've probably heard of the passive voice—perhaps in a comment from an English teacher or in the grammar checker of a word processor. In both of these instances, you were (likely) guided away from the passive voice. Why is this the case? Why is the passive voice so hated? After all, it's been used in this paragraph already (twice now!). When the passive voice is used too frequently, it can make your writing seem flat and drab. However, there are some instances where the passive voice is a better choice than the active.

So just what is the difference between these two voices? In the simplest terms, an active voice sentence is written in the form of "A does B." (For example, "Carmen sings the song.") A passive voice sentence is written in the form of "B is done by A." (For example, "The song is sung by Carmen.") Both constructions are grammatically sound and correct. Let's look at a couple more examples of the passive voice:

ACTIVE VOICE: Tamara lost the potential sale in North Dakota.

PASSIVE VOICE: The potential sale in North Dakota was lost.

You may have noticed something unique about the previous passive voice example: the passive voice can be used to "hide" who performed the action. Despite this sentences being completely grammatically sound, we don't know who lost the sale if we only read the passive sentence. This could be a good way to focus on ways to improve company strategy, rather than focusing on a single person's performance (and avoid calling out a single employee in a potentially public setting). If, however, it is important that Tamara lost the sale, but we want to focus on the loss rather than who lost it, saying "The potential sale in North Dakota was lost by Tamara,"

The passive is created using the verb *to be* (e.g., the song **is** sung; it **was** struck from behind). *To be* conjugates irregularly. Its forms include *am, are, is, was, were,* and *will be*, *had been*, *is being*, and *was being.*

Business writing is known for being direct and to the point in most situations, so you should favor active rather than passive verb constructions. But there are occasions when being too direct can make you sound insensitive. Consider the following refusal of a request for a raise:

1. ACTIVE VOICE: You cannot have a raise at this time.
2. PASSIVE VOICE: A raise can not be given at this time.

In this case, the goal of using the passive voice to soften the negativity of the message has made the message sound more considerate. If you are trying to avoid throwing someone under the bus, one strategy is to de-emphasize the actor or subject in the sentence. Bring out your sensitive side by knowing how to tactfully apply passive voice. Reserve passive verbs for the moment you need to say “no” in a message.

> **LEARN MORE**
>
> For more information on how and why to use the passive voice check out Using the Passive Voice in Lumen’s *Guide to Writing*.

Clarity

Word selection and phrasing leads to successfully transferring meaning from the sender to the receiver. Doing this well enhances the writer’s reputation. The business’s reputation also grows—not in a blatant way but in a behind-the-scenes way. Think of the advice a home seller receives before an open house: have bread baking or apple cider simmering to create an aroma that makes the house feel more like a home. This small step might help a potential buyer make the right choice. Solid writing skills do that for the employee. The employee gains respect and appreciation thanks to writing skills that project credibility and confidence.

Precision

Business communication should be clear, specific, and chock-full of meaning. Work to be precise.

Avoid	Try
Capable of greeting many customers while attending to a multi-line phone.	Capable of greeting 25 customers an hour, while managing incoming phone lines for six district managers.
Your order has been received and will ship shortly.	Order number 1234, received August 1, ships on August 5. You should receive the order on August 8.

Plain Words

When trying to enhance your reputation, it is tempting to want to use complex words in order to appear smart and sophisticated. Unfortunately, this tends to obscure your ideas and potentially damage your credibility. Remember the focus of your writing should be on the reader understanding the message. Instead of focusing on “sounding smart,” concentrate on expressing accurate content with precise, unambiguous words so that the message is transmitted clearly. Be precise while understandable.

Avoid	Try
It sure seemed like the lawyer was trying to obfuscate the meaning.	It sure seemed like the lawyer was trying to confuse the meaning.
The remuneration the contractor receives is commensurate with the time and materials used.	The pay the contractor receives is equal to the time and materials used.

Lists

Lists can be used in several ways. Working with numbered lists or bulleted lists is a fast way to draw attention to several items. Lists add white space to a document, which helps the reader. They add emphasis because they stand out on the page. Numbered lists are used when order or importance matters.

Avoid	Try	Why
The store needs several items to process the refund for the incorrect billing. If you have the receipt, we'll need that. After you find the receipt, circle the incorrect payment and add the voided check to the envelope. Remember that a stamped return envelope will get your money back more quickly. Please be sure to add that.	To process your refund, the store needs several pieces of documentation. Please do the following: 1. Find the original receipt 2. Circle the incorrect items 3. Find the voided check 4. Complete a self-address stamped envelope Include all items with your request.	A numbered list provides the correct order and structure for the reader. It creates white space in the message.
When you go to the store, can you remember to get the items I need for my recipe? I forgot to get one orange, eggs for the mix (2), and the red for the icing ,so I'll need one bottle of red food coloring.	At the store, please purchase • one orange • two eggs • one bottle of red food dye	It's likely the shopper only needs to know what to buy, not why to buy it.

PRACTICE QUESTION

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Parallel Construction

Parallel construction of sentences, lists, and even headings makes messages much easier for the reader to absorb. Sometimes, for the newer writer, it might be easier to think of a predictable rhythm or format when working on how to achieve parallelism. Think of the beat of poetry or songs and how it makes the words easy to remember and predict. As a writer, you can use that same structure to your advantage.

Compare the two following sentences:

- Yara loves running, to swim, and biking.
- Yara loves running, swimming, and biking.

Was the second sentence easier to comprehend than the first? The second sentence uses parallelism. All three verbs are gerunds, whereas in the first sentence, two are gerunds and one is an infinitive. While the meaning of the first sentence comes through, it's easy to trip up over the mismatched items. The application of parallelism improves writing style and readability, and it makes sentences easier to process.

Compare the following examples:

- Lacking parallelism: "She likes cooking, jogging, and *to read*."
    - Parallel: "She likes cooking, jogging, and reading."

    - Parallel: “She likes to cook, jog, and read.”
- Lacking parallelism: “He likes to swim and *running*.”
    - Parallel: “He likes to swim and to run.”
    - Parallel: “He likes swimming and running.”

Once again, the examples above combine gerunds and infinitives. To make them parallel, the sentences should be rewritten with just gerunds or just infinitives. You could argue that the first sentence is correct in that “cooking,” “jogging,” and “to read” are all grammatically valid conclusions to “She likes.” However, when you put them together, the lack of parallelism leads to an incorrect sentence. Think of it this way: separately, Brussels sprouts, marshmallows, and sardines are delicious; together, they’d be kind of horrifying. An easy way to think about this is to make your sentence into three separate sentences:

> **The dog likes to** run.
>
> **The dog likes to** play fetch.
>
> **The dog likes to** go to the dog park.

Remember how we talked about poetry or song at the beginning of this section? You can see from these three sentences that they “rhyme” in all but the last few words. To achieve parallelism, identify where the sentences start to be different, in this case, after “to.” Therefore, what comes after “to” is what your list should be made of in order to be parallel. Then check your parallelism by making sure that each of the items represents the same part of speech. In this case, each item–“run,” “play,” “go”–is a present-tense verb, so the parallelism works.

> The dog likes to
>
> **run.**
>
> **play** fetch.
>
> **go** to the dog park.

Here are a few more examples of parallelism in which the elements are all different lengths and types:

> Jackson and Krista are cooking dinner, David and Rogelio are setting the table, and Ollie and Ron are picking up dessert. *(Parallel elements are independent clauses that could stand alone as sentences.)*
>
> Juana looked for her phone under the table, on top of the bookcase, and inside the cupboard. *(Parallel elements are prepositional phrases.)*
>
> Mandy and Torrence watched *The Godfather, Mary Poppins,* and a documentary about pelicans. *(This may look tricky, but all of the elements in the list are nouns, so the sentence is parallel. Also, Mandy and Torrence have strange taste in entertainment.)*

PRACTICE QUESTION

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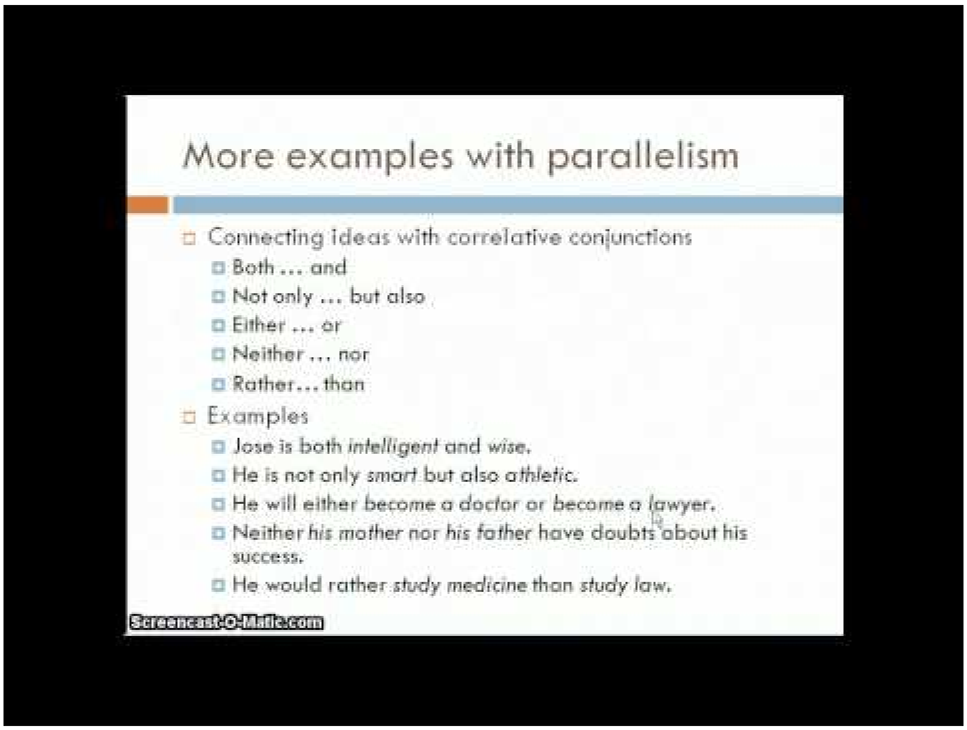
Parallelism can also apply to the way you talk about similar elements in general. If you’re writing a research paper that includes references to several different authors, you should be consistent in how you cite them. For example, if you talk about Jane Goodall and Henry Harlow, you should say “Goodall and Harlow,” not “Jane and Harlow” or “Goodall and Henry.” This is something that would carry on through your entire paper. You should use the same mode of address for every person you mention. Maintaining parallelism can also keep you from unintentional bias. Referring to three physicians as Dr. Jameel Smith, Dr. Samuel Evans, and Kathy will probably not make Dr. Kathleen O’Rourke very happy.

Parallelism is really helpful when you're making lists, tables, or outlines. Think about the difference between these two versions of a list in an internal report:

~ Tasks to be completed before the end of the quarter: • Compile quarterly and aggregate sales data • We should ask HR for a salary audit • Presenting findings to the board • Jeff does more searching for office space	~ Tasks to be completed before the end of the quarter: • Compile quarterly and aggregate sales data • Request salary audit from HR • Present findings to the board • Continue office space search

Which one is easier to follow? Which is more professional in its look and feel? Essentially, any time you have a list—whether it's within a single sentence or has a larger scope—you should focus on parallelism.



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Emphasis

The correct amount of emphasis in business communications can help readers easily access the intended message. However, what is considered appropriate emphasis can differ drastically in this age of texting and social media. Remember that business communications are a part of a professional setting. While humans write the communications, the situation remains one company communicating to another or to a customer. This is not a personal communication that might include emotion or symbols for emotions.

Avoid	Try	Why
ABC Company loves the opportunity to fill your Pick n Pack order.	ABC Company appreciates the opportunity to fill your Pick n Pack order.	"Love" is an intense human emotion, not the emotion of a thing—a company.
Allied Sales is so sorry and apologizes for the trouble the late delivery caused your pets.	Allied Sales shipped the late order at its own expense with overnight delivery to make up for the missed shipment.	Apologizing can bring blame upon a company. Avoid doing so unless you consult the corporation's lawyer. The company may not be all that sorry if the customer did not allow sufficient time. Move to the solution rather than increasing the focus on what went wrong.
Your order is appreciated!!!	Your order is appreciated.	The exclamation mark is clearly a mark of personal enthusiasm. Yet, most business communication is that "thing"—the company—rather than a human communicating. The introduction of this symbol in to business writing is relatively new. It can make the writer seem immature in the workplace.
Please see the corporate request. There are FIVE QUESTIONS TO ANSWER.	Please see the corporate request. There are five questions to answer.	Using all capital letters is construed as yelling at someone. This effect is further magnified when it comes in a downward message. Write well enough that the words communicate meaning clearly.
Recently, employees have erroneously entered wired rather than rewired on service orders.	Recently employees have erroneously entered *wired* rather than *rewired* on service orders.	Use of Italic font provides emphasis without the startling impact of all capital letters.
She wanted to be called Susan not Sue.	She wanted to be called **Susan** not **Sue**.	Use of bold font provides emphasis without the startling impact of all capital letters.
If a RX5 cable is shipped an EU45 must be shipped at the same time.	If a RX5 cable is shipped an EU45 <u>must</u> be shipped at the same time.	Use of underline font provides emphasis without the startling impact of all capital letters.

PRACTICE QUESTION

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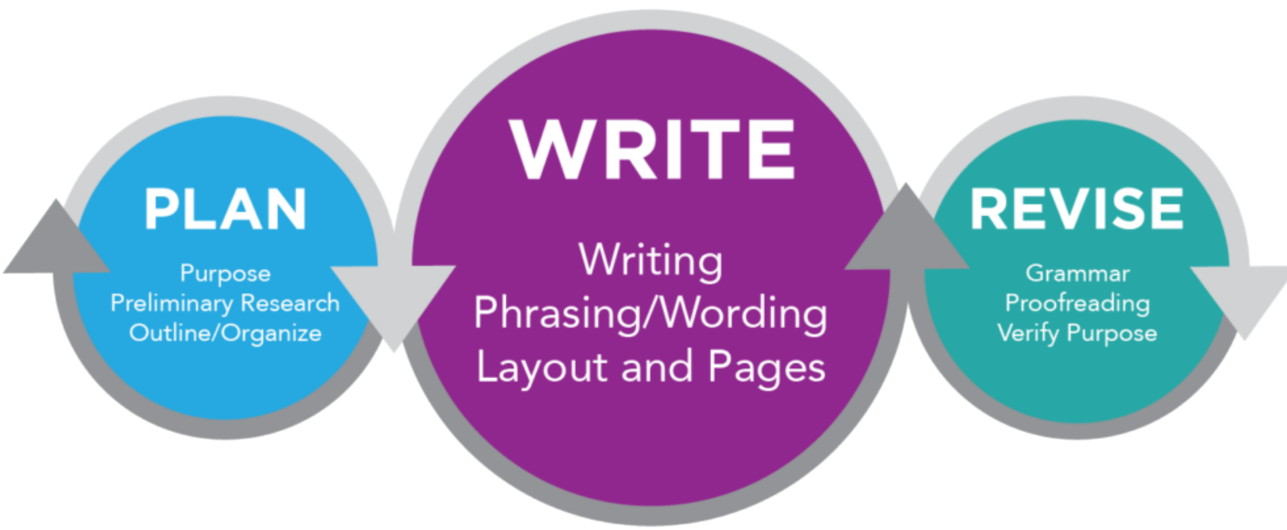
In the examples above, notice how italic, bold, or underlined fonts all provide emphasis in a similar fashion. Any of the three are equally helpful, and the choice should be made based on what the organization or the writer prefers.

The analogy that best suits emphasis in a message is to think of salt in food. Some salt is tremendously helpful and enhances the dish. Too much salt is off-putting and may even be sickening.

THE THREE-PART WRITING PROCESS

What you'll learn to do: Identify the three parts of the writing process

Writing a message that is consistently well received can become a habit, but it can be hard for new writers to achieve. The three part writing process ensures the best outcome each time.



Good writers plan their messages, often using an outline or notes made before writing the message. Lack of a plan before writing may *seem* to save a writer time, but it can confuse the writer once she begins, and it slows the receiver. The communication will not be at its best that way. This module discusses how to improve speed and clarity in communication. With a solid outline, the actual writing focuses on phrasing and word choice. This module discusses how to word the message with a you-view. Finally, the message is reviewed and revised. This module provides the final clean-up tools to help you proofread during the revising step.

LEARNING OUTCOMES

- Discuss the importance of the planning stage in the writing process
- Write a business message based on an outline using the appropriate components of a business message

- Revise a business message for tone, message, and correctness

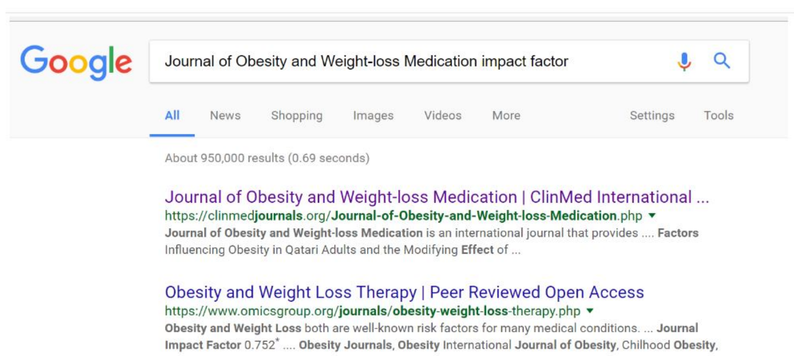
Planning Business Messages

While this whole module is about writing, most of the *thinking* about what you are going to write happens before you compose a single sentence. Planning and outlining is where your analysis and organization get done, so that when you're ready to write, all you have to worry about is sentence structure, word choice, and tone—which is more than enough!

Remember those school days when teachers required outlines before you could start writing your paper? They may have referred to it as part of a "pre-writing" phase. It turns out those outlines are life skills, not just busy work. As adult business communicators, you should still commit to outlining. An outline serves as a road map for what you're going to write, *and* it aids in breaking weak writing habits. Outlines set a writer up for success. Unlike in school, they do not need to be formally typed and numbered; they can exist on a notepad or scrap to the side of the keyboard. That said, using your word processor's outlining function is a great way to keep your outline tidy, and cutting and pasting makes it easy to rearrange your order.

First, determine how the receiver of this communication likely feels about the communication: positive, neutral or negative. Focus on what the receiver feels based on the receiver's situation. Do not factor in "How I'd like to hear this news." The receiver has not researched this message, might not have heard parts of the topic before, or has the background you have. The receiver may have a different work responsibility and may need background to fully appreciate the communication. Factor all of that into the audience analysis. This is you-view planning. You-view thinks about what the **receiver** wants and needs to understand. Do not factor in your own feelings.

Planning is the key first step in the writing process because it enables the writer to begin thinking about how the final product will be created and evaluated. It is the first step in establishing your accountability and reliability as a writer. Remember that when you are writing for a corporation or organization, your writing lives on as legal documentation and reference. Writers are no less responsible for accountability for their work than are lawyers and medical personnel. Solid planning leads to reliable final documents.



Skipping the pre-writing stage is like taking a vacation without first choosing a destination: If you don't know where you're going, how will you get there? Fortunately, pre-writing can take many forms, and there are strategies that suit every type of writer.

The strategies and processes used in the pre-writing stage not only help the writer formulate a topic and solidify ideas, they also serve as a kind of rehearsal for the rest of the writing process. As the writer uses the vocabulary associated with a particular topic, he or she becomes well-versed in the subject and is able to express ideas with more confidence, organization, and clarity. All of this brings to mind the old joke, "How do you get to Carnegie Hall?" The answer, of course: "Practice. Practice. Practice."

Just as a musician must practice their instrument in order to achieve their goal, the practice undertaken during the pre-writing stage guides the writer toward a specific goal. That goal is to develop a well-defined topic that will eventually be couched in the language of a succinct thesis or hypothesis.

Planning starts with audience reaction, which maps to an organizational structure for the document.

Earlier in this module, three audience types were introduced: positive, neutral, and negative. These audiences may receive positive, negative, or persuasive messages:

- Positive messages are routine or good news. The receiver is likely to react positively or neutrally.
- Negative messages are bad news. The receiver is likely to react negatively.
- The overlapping category is persuasive messages. The audience is expected to need encouragement to act as the sender desires. In some cases, the receiver is more like a positive audience. In other cases, the receiver is more like a negative audience.

All messages contain three or four blocks:

1. **News**: Whether good news or bad news, the message states its point clearly. There receiver should clearly understand the news unambiguously.
2. **Reasons:** The reasons section supports or explains the news. This is the needed detail to aid the receiver's understanding or action.
3. **Goodwill and Action:** This is the closing paragraph where the sender provides a brief, sincere remark designed to continue the working relationship. The closing paragraph is not finished without some detail or reminder related to the purpose of the communication, or call to action.
4. **Buffer**. This is usually only found in negative and some persuasive messages. A buffer starts a message where the reader is likely be to the negative side of the continuum by warming the reader to the topic, but not laying out the entire outcome of the message.

Depending on your audience reaction, you will place these blocks in a different order:

Positive Message Outline

The basic organizational outline for a positive message uses the blocks introduced above in that same order: news, reasons, and goodwill and action. Remember, this is the outline for writing the entire message (the second step in the writing process). The blocks are the labels of the outline section where the writer collects notes and thoughts on that part or paragraph. With these notes, the writer can write the entire message without stopping to look for detail.

In this example of a positive message, assume the sender is confirming the receipt of a duplicate shipment and has agreed to provide credit.

Organization Block	Purpose	Notes for the Message
News	With a positively inclined receiver, the main idea is in the first paragraph, first sentence. The reader wants to know some and is receptive, so the writer should just say it:	***credit due 3/31***
Reasons	This is the body of the message that contains the detail supporting the news	***"The Leadership Experience" duplicate received.*** ***Invoice attached.*** ***Credit processed against acct 234-2345***
Goodwill and Action	Acknowledge and effort or relationship with the receiver. Confirm any commitments.	***She sent clear detail. Should see on April statement.***

Negative Message Outline

The generic organizational outline for a negative message uses the three blocks news, reasons, and goodwill and action. It uses these organizational blocks in a different order and also adds the buffer block. Remember this is the outline for writing the entire message (step 2 in the writing process). With these notes, the writer can write the entire message without stopping to look for detail.

In this example of a negative message, assume the sender is delivering the bad news about a delay in the promised ship date of a book. The receiver needs this to prepare for a two week training conference but didn't order it early enough.

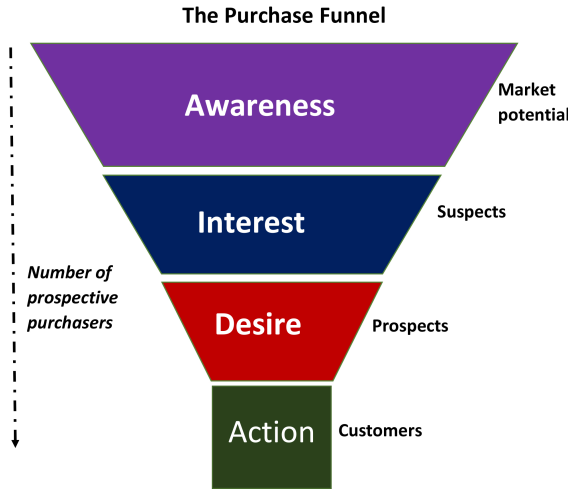
Organization Section	Purpose	Notes to write message from….
Buffer	Starts the message by being on topic, but not clearly laying out the news. It is important to start neutrally so as to avoid getting the reader's expectations set to high.	***Been a customer for many years.***
Reasons	This is the body of the message that contains the detail supporting the news. Reasons must have you-view. Avoid mentioning policy or rules as this just encourages the reader to escalate to a higher level of management.	***Very popular title.*** ***good quality takes time.***
News	The bad news is stated directly, yet gently. Offer any offsetting news, if possible. Avoid apologizing. It can bring on legal guilt in extreme situations. In many cases, the sender's company did nothing wrong. If truly necessary and in alignment with company policy, then apologize.	***book delayed by 7 days. focus on her receipt added free shipping.***
Goodwill and Action	Avoid sounding trite but express interest in continuing the good relationship. Confirm the delivery date.	***past good experiences. delivery april 5*** Notice there is missing punctuation and capitalization. These are only notes, so those issues will be cleaned up in the following steps.

Persuasive Message Outline

The simplest understanding and approach to persuasive messages is to determine how likely the receiver is to comply with the sender's wishes. If the audience is positive, then follow that outline. For negative audiences you need to use a different approach.

It is helpful to overlay these structures with the marketing concept of Awareness, Interest, Desire, and Action (AIDA).

This strategy starts with the opening of a positive or negative message. The opening should include an attention grabbing opening, such as a fact, question, or something to catch the receiver's interest. Next, direct your writing to discuss more details to interest the receiver in this situation. The desire is about how the receiver's help or action matters. Finally, the closing includes the specific action requested of the receiver.



PRACTICE QUESTION

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Writing Business Messages

It's also helpful to remember at this stage that you're **not** actually starting from a blank page, even with your first draft. You've got the raw materials of your pre-writing, outlining, and source gathering at hand to build from.

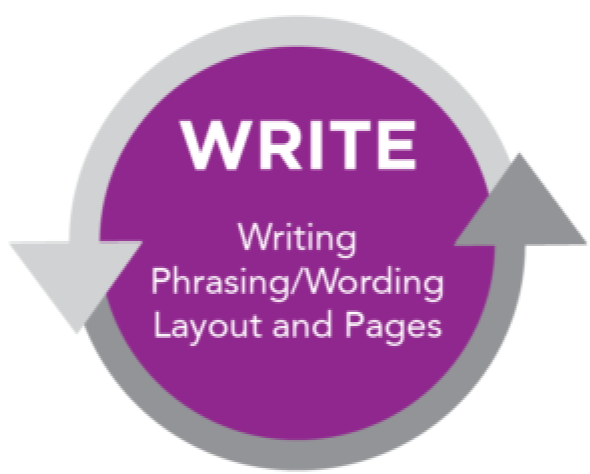
From Planning to Writing

At this stage of the process, the purpose and organization of your message is already decided. Now you need to craft the words and phrasing for each part of the message.

Whichever outline you've started with, it can seamlessly morph into a first draft simply by choosing an area to attack. Start fleshing it out with full sentences, complete thoughts, and relevant sources.

The format for the communication matters. Letter formats and layout are discussed at the end of this module.

Before examining types of messages, there are skills to have in hand.



Writing Skills

Subject Line

The subject line is surprisingly important in business communications. It is found in both email and memo formats. Subject lines are a mini introduction to the message. However, they do not replace the need for subject to be addressed in the first paragraph of the communication.

What	Avoid	Try
Subject Line	Regarding next Tuesday's meeting	Items to bring for Next Tuesday's meeting
First line of the message	Will you bring the pens and pencils?	Will you bring pens and pencils to next Tuesday's meeting?

Subject lines are succinct introductions to a direct, negative, or persuasive message

What	Avoid	Try
Direct Message	Conference Dates	Please confirm conference dates
Negative Message	Problem!	Confirmation needed Order 3145
Persuasive Message	Need a Speaker	Speaking Opportunity for You

Check to see if your subject lines pass a simple list of questions:

- Is the main idea apparent from the subject line?
- Is it more a phrase than full sentence?
- Can the receiver judge the urgency with respect to whether they must read the message now or can leave it for later?
- Will the receiver be able to find this message again easily based on your subject line?

Constructing Buffers

Buffers are a specific component of negative messages. They allow the writer to start the message without fully disclosing the bad news that is coming. Buffers must be more than an unrelated hello such as "How about those Broncos?" They must lead in to the topic while avoiding negative overtones. At the same time, a buffer shouldn't promote an untruth or raise the recipient's hopes only to dash them. For example, in writing to a job applicant, the subject line, "You are our best candidate" only to follow in the body with "but unfortunately, we needed to hire from within the company, so you didn't get the job" is needlessly cruel. On the other hand, "You are one of many impressive candidates," is both honest and appropriately complimentary while serving as a buffer.

Buffer Topic	Sample	Reason for the "No"
Item of Agreement	Planning a 250 person wedding is quite an undertaking.	The larger ballroom is booked on that date.
Compliment	The American Cancer Society provides excellent support to the community of Centennial, MO.	The organization cannot fund the charity golf tournament this year.
Reasons	With the increase in interest rates, there is a decline of 5% in new client calls.	There are account reassignments planned.

Negative Words and Tone

Business relationships are like all relationships. There are ups and downs. At times employees, customers, and others must hear news that is not to their choosing. Two important skills save the relationship while delivering the bad news. In all situations, the sender works to avoid negative words and tones. These words and tone can overshadow even the best message, like gray clouds on a warm summer day.

With negative messages there comes a time where the bad news must be stated. A skilled writer who plans the message well has this part of the message contained to a single area of the communication. Yet, when saying "no," the meaning must be clear. Sometimes the most diplomatic form of clarity is achieved with a skilled "implied no." Consider how the following are clear, yet avoid a negative word or tone.

Avoid	Try
April 23 is not available.	Rooms are available April 20–22 or April 24–29.
Snakes are not allowed on the plane.	Please see our pet policy that allows cats, dogs, and peacocks. (Add "only" if needed—only cats, dogs, and peacocks.)

You-View

In defining positive messages, both good news and expected news fit the category. However, some expected news may not please the receiver. The you-view in writing helps the sender keep an overall good relationship to the receiver. Consider the following:

Avoid	Try	Why
Do not park in Lot C. It is being resurfaced.	While Lot C is resurfaced, Lots A and B should be used.	The direct object "you" is assumed with the instruction of "do not." Coupling a "you" with a "no" in the same sentence is likely to annoy or feel accusatory to the receiver, thus damaging the relationship. State what is possible rather than what is not.
I can't wait to help you.	I look forward to helping you.	Here is something the sender wants to do, but the example clouds the positive desire with the negative "can't." If you as the sender are eager, then be eager rather than confusing the issue with a negative.
The claim is forthcoming, however, another form is needed.	Another form is needed before the claim is processed.	"However" is frequently considered a negative word since it contradicts what comes before. The word "but" works in a similar fashion.

Writing a Positive Message

Consider the following example outline constructed in the planning process:

News	Need quote on security components
Detail	4 PCs, 2 printers, 1 wireless router. Need itemized cost, warranty/mtc, installations date
Goodwill and Action	2 year contract in place. Hope for April 15.

With this outline in place, the message is formatted as a business letter or email as the situation warrants.

Comments on Section	As Written
First Paragraph: Start the message with the news. This is a positive message. Focus on the receiver and realize all she wants to know is “what do I need to do”. The message opens with a you-view. The “Please” is saying “you need to” but in a positive manner. The main idea is easy to find. It is not hidden by unnecessary phrasing or preamble that does not advance the purpose of the message.	Please provide a quote for updated security systems.
Second Paragraph: Using paragraphs respects the reader by providing white spacing thus making the message easier to read. Paragraphs provide logical breaks to aid in understanding and retention. Bullets do not exist except as part of a paragraph. There is the introduction to the paragraph and then the lists. Lists are easier on the eyes through use of white space. They aid in retention. It will be easy for the receiver to mark off items as completed. List items are constructed in a parallel fashion.	With your familiarity of our system, please maintain compatibility and quote for the following items. • 4 PCs • 2 printers • 1 wireless router In the response, please address the following questions: • How much is the total and itemized cost? • How much is the warranty and maintenance cost? • When is the earliest installation date?
Final paragraph: Encourages the relationship with a specific note of goodwill. Provides a crisp reminder of the action needed.	Thank you for being so easy to work with over the past two years. If possible, please provide this quote by April 15. If it will be later, please call to let us know.

Writing a Negative Message

Assume that the outline for this negative message constructed in the Planning process is the following. Notice that there is a typo where “april” is not capitalized. For the outline, that is just fine. These are organizational notes that only the writer sees:

Buffer	Long relationship of mid-april conventions. Past relationship
Reasons	New personnel. Competitive month and rates
News	Conference date must move earlier or back one week
Goodwill and Action:	Discount. Must hear by March 5

With this outline in place, the message is formatted as a business letter or email, as the situation warrants.

Comments on Section	As Written
Buffer: First paragraph — Start the message with a note that relates to the message, one that both agree on. Do not be so cheerful as to mislead the audience, nor set a dark tone that may cause additional trepidation in someone is about to be disappointed. By not immediately confirming availability, the reader can begin to prepare for the upcoming news.	Your organization has been a longtime partner of Aspen Lodge, and we have been honored to be your location of choice for your annual April conference. Thank you for your recent letter regarding next month's availability.
Reason: Second paragraph. It is so tempting to write reasons for a no from the perspective of the sender. "We are all full." "Company policy says." Reasons in a negative message offer the reader a way to see it from the writer's standpoint. If the message is well written, by the the time the "no" comes, the receiver will be in complete agreement.	With such a warm winter, your choice of Aspen Lodge remains one desired by many organizations eager to come west. The Lodge is always popular with local organizations due to the low off-season rates, which means facilities book quickly and early.
Reason continued: Either second or third paragraph. Here is the hardest part of the message. The reader is likely anticipating being turned down by now. It is up to the sender to make the "no" clear, but not harsh. This may be done directly or with an Implied no. This writing assumes the group always comes on and had requested the second weekend. One key issue to watch out for when delivering negative messages in this way is that you might work to avoid negative words so intently that you make the message hard to understand. In this case, talking about the weekends that *are* available leaves the message pretty clear.	With the second weekend already reserved, would you prefer the first or third weekend?
Final paragraph: Encourages the relationship with a specific note of goodwill. Provide a crisp reminder of the action needed.	Please call by Friday March 31st, to confirm which of the two remaining weekends best suit your needs. Aspen Lodge is booking quickly, and we hope to have good friends like ABC company here again this year. Because you have been such a loyal partner, we are offering a 5% discount for whichever weekend you do end up choosing.

Writing a Persuasive Message

With persuasive messages, the audience analysis in the planning stage will point you in the right direction. This example outline assumes that the receiver needs a push to accept the solution being presented. In this example, a marketing team has planned to do some focus groups in Manhattan among a difficult-to-find consumer segment (let's say, left-handed teenage girls who like both crocheting and motocross racing). The facility that's finding and scheduling the participants is having a hard time finding enough of these girls in Manhattan, so they want to loop in a partner facility just across the river in New Jersey. It's going to cost the marketing team more money, which they've anticipated but still won't like, and it will involve extra travel. Here's one way to present that news.

Buffer / Attention	More diverse research participants in Manhattan and Newark
Reasons / Interest	A more diverse set of participants in two locations
News	We can't find enough qualified people in Manhattan, so we're adding our Newark location
Goodwill and Action:	Travel between locations on a deluxe chartered coach bus at no extra cost

With this outline in place, the message is formatted as a business letter or email, as the situation warrants.

Comments on Section	As Written
Buffer: First paragraph— Start the message with a note that relates to the message, one that both agree on. Do not be so cheerful as to mislead the audience, nor set a dark tone that may cause additional anger in someone is about to be disappointed. By starting with the good news, the writer can offset any disappointment or annoyance at the bad news.	Thank you for entrusting us with this interesting and challenging recruit. We're calling on all of our experience to make sure we find you the best participants to meet your research needs and finding girls who not only meet the specifications but also represent a range of ethnicities and income levels.
Reasons: Second paragraph— It is so tempting to write reasons for a no from the perspective of the sender. "We are all full." "Company policy says." What reasons in a negative message do are to offer the reader a way to see it from the writer's standpoint. If well written by the the time the "no" comes the receiver will be in complete agreement.	As you've known from the start of the project, finding participants that meet your specifications was going to be difficult, and we are about halfway recruited. We have placed ads in the newspapers and online, and we have asked motocross courses to recommend members who might qualify.
Reasons continued: Either second or third paragraph— Here is the hardest part of the message. The reader is likely anticipating some sort of bad news by now. It is up to the sender to make the difficulty clear but not harsh. Even with the Goodwill action, there's likely to be some annoyance on the part of the receiver.	However, we seem to have stalled in finding people to come to our Manhattan facility. As we see it, we have two choices. We can relax the specifications, which might water down your data, or we can reach out to a partner company in Newark. Between the two facilities, we believe we can fully recruit your research study. As we discussed at the proposal stage, this will incur extra cost, and we recognize that you had not built travel to Newark into your schedule. Therefore, we have taken the liberty of reserving a deluxe coach bus and driver at our expense to move your team from their base in Manhattan to the facility in Newark on the days you will be there.
Final paragraph: Encourages the relationship with a specific note of goodwill. Provide a crisp reminder of the action needed.	Please let us know whether this solution is acceptable or whether you would like to loosen your participant specifications. Please also tell us whether we can help with anything else, including changing hotel accommodations using our corporate discount. We are very much looking forward to hosting you and your team for this groundbreaking research. If I hear from you by Wednesday morning, I can lock in whichever option you choose and move forward with the work.

PRACTICE QUESTION

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Revising Business Messages

Once you've written your message beginning to end, you may be feeling pretty proud of yourself and ready to move on to your next task. Well, not quite. It's time to clarify, refine, and reorganize to make sure your message is exactly what you want it to be.

The Art of Re-Seeing

Revising is the rearrangement and fine tuning of a fully developed—if not totally completed—draft so that the thesis or hypothesis is aligned with the writer's purpose, the audience's needs and characteristics, the development of the argument, and the persuasive conclusion.

A Critical Step

Revising, for many writers and teachers of writing, is the most critical step in any writing process. It is also the step that often frustrates many writers because it can be hard to maintain objectivity and focus when looking so closely at your own work.

Many writers find it beneficial at this stage to have someone else read the document they have been working on, since it is too close to the writer's thoughts and emotions. Remember that when you ask someone for a critique of your work, you are not asking for praise for your brilliance but rather asking to have your work made even better and more effective for its purpose. Also keep in mind that just because someone makes a suggestion doesn't mean you have to accept it. Unless that person is your boss, of course.

The need to revise acknowledges the likely scenario that no one's writing is perfect as presented in the latest draft. Willingness to revise means that the writer recognizes the dynamic nature of communication and that revisions are required in order to clearly articulate ideas and meet the expectations of the audience. Effective written expression is the result of careful revisions.

PRACTICE QUESTION

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Revision Skills

A Two-Step Revision Process

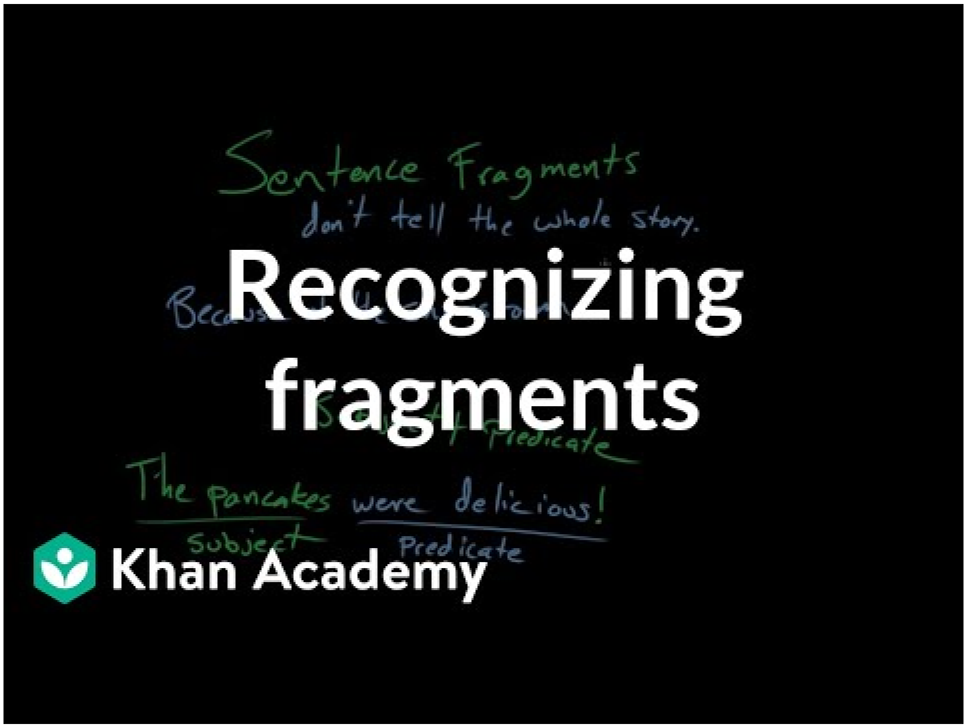
In the revising process the writer does two things:

1. Ensures the final messages accomplishes the goal identified in the planning step. This is content evaluation.
2. Ensures the grammar and proofreading step has corrected any errors. This makes sure the wording is easy to read for the receiver and that the writer's reputation is well-served by a professional document.

Proofreading Skills

Fragments

As the final readings of the message, short or long, completes, make sure there are whole sentences.



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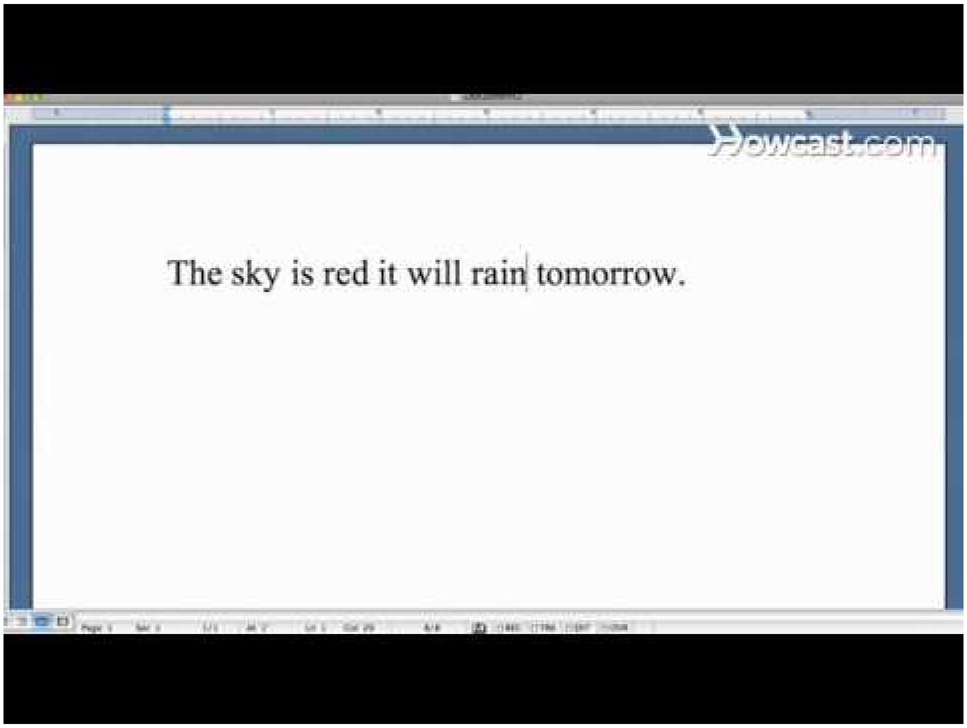
Run-Ons

On the other side of fragments are sentences that go on and on and on. Beware the run-on sentence.



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WORD PROCESSING SOFTWARE

What you'll learn to do: Use common word processing software to write business messages

There is a wide variety of word processing software used for business communication. A business document's layout is usually simple, but do not mistake simple for lacking structure. There are expectations for page layout and formatting. Microsoft Word and Google Docs are two of the most common word processing software applications. This section presents an overview of how to use these applications to create a business letter.

LEARNING OUTCOMES

- Discuss common guidelines to create a professionally formatted document
- Use Microsoft Word to create a visually appealing and accessible document
- Use Google Docs to create a visually appealing and accessible document

Formatting Business Writing

In order to properly format a document, we must first understand the primary components of that document. These skills—including spacing, emphasis, and more—are the same skills used in emails, memos, business reports, and employability documents.

Two of the most widely used examples of word processing software are Microsoft Word and Google Docs. Both Word and Google Docs provide the business writer with the formatting tools needed to create professional documents.

Specifications of the basic letter, memo, or email format:

- Paragraphs are not indented
- Line spacing is 1.0 (or 1.15) in the paragraph
- Line spacing is 2 between paragraphs
- Left margin is justified/aligned, which means it looks like a straight line
- Right margin is ragged (left aligned paragraph) or straight line (block paragraph)
- Font size is 10 or 12 depending on font type (Arial and Times New Roman are common fonts because they are universal across PC and Mac platforms)

Business Letter Format

There are numerous online sources describing the format of a business letter. Many businesses have specific formats for communications coming from their organizations, and of course, those formats take precedence. There is likely pre-printed letterhead with the company logo and address available. Today, it is commonplace to include company email and website addresses in the address block or heading.

As you begin to use both Word and Google Docs, you will become familiar with templates that help with many of the spacing issues.This section comes from a widely recognized source, Purdue OWL (Online Writing Lab). There are several common styles: Block, Modified Block, and Semi-Block. These instructions address the most common parts of a business letter using block format.

- Sender's Address
- Date
- Inside Address
- Salutation
- Body
- Closing
- Enclosures or attachments

Business Memo and Email Format

With the increasing use of email, memos are less frequently found in the workplace. For business writers, to think of memo and email formats as the same is not too far a reach. Pay careful attention to the subject line in both emails and memos. As discussed in the previous sections, the subject line plays a critical role in providing guidance for the reader regarding urgency, topic, and actions to take. In an email or memo, use **bold** paragraph headings for scanability. Doing this helps you stay organized, and readers love it because it helps them pick out the most important information easily.

For more information on how to format a memo take a look at this document on standard memo formatting or Module 3: Written Communication's page on memos.

PRACTICE QUESTION

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Style

When formatting any written communication, it's important to end up with a document that's pleasing to the eye. Here are a few quick tips on making your document look good. For more tips, take a look at Format: Make Your Message Inviting.

White Space

> White space between words, white space between paragraphs. White space between sentences.
>
> When you see a block of text, break it apart into shorter paragraphs, sentences, words or bullet points.
>
> Sculpting as you go.
>
> You dear writer, shape the meaning of your content with the words, but shape the presentation by formatting.
>
> By the white space.
>
> —Demian Farnworth (Note: Farnworth, Demian. "How To Dramatically Improve Your Writing With White Space." nd. Web. 13 June 2018.)

For business writers, the choice of white space is not as free-form as sculpture, yet there are standard conventions to apply and business writing choices that aid the reader. Standard conventions appear in the final section of this module.

Notice how the quote from Farnworth has short lines and uses the blanks space showing through to break up the text. The rhythm of the words is represented visually. In business writing, paragraphs, just like sentences, are kept relatively concise. There is no prescribed length, but writers tend to avoid one sentence paragraphs. Writers also tend to avoid paragraphs that result in long, uninterrupted blocks of text. Regardless of length, each paragraph will have have a topic sentence with just as much support as it needs—no more, no less.

Lists

Lists are excellent tools for two reasons: They create white space and they create a pattern that is easy for a reader to understand and recall. There are two types of lists: numbered (enumerated) and bulleted.

Use **numbered** lists when order or importance matters:

Avoid	Try
To make toast, first plug in the toaster. Second, slide the bread in to the slot. Third, push down on the toasting lever.	Steps to make toast: 1. Plug in the toaster 2. Slide the bread in to the slot 3. Push down on the toasting lever

In this example, the order of steps to make toast matters. Pushing down on the toasting lever provides no value without the bread loaded into the slot. Also notice how much easier the “Try” column was to understand and retain.

Avoid	Try
The reasons the store is staying open later are that first, studies show per store profits increase by 3%. Second, customers like a pharmacy open in the evening for emergencies. Third, the Associate Manager lives close by, so a bit of a commute is not a worry.	The reasons the store is staying open later: 1. Studies show per store profits increase by 3%. 2. Customers like a pharmacy open in the evening for emergencies. 3. The Associate Manager lives close by, so a bit of a commute is not a worry.

Notice that the Associate Manager’s preference likely was not as important to the additional store hours as sales and customer preference were.

Use **bulleted** lists when the items are of equal value.

Vegetables that may be mixed in store-made salads are lettuce, tomatoes, carrots, or spinach	Vegetables that may be mixed in store-made salads: • Lettuce • Tomatoes • Carrots • Spinach

In this example, notice that any of the vegetables may be used. One item is not more important than the other. It does not matter the order in which the items are selected.

List items may be one word long, a phrase long, or a sentence long. They each must be constructed with parallel organization (see previous section on Parallel Construction).

Lists items may end with punctuation or without as long as they are all the same. Notice the consistency in the lists above.

Headings

Headings provide significant assistance in longer messages or reports as a way of guiding the reader and providing white space to separate ideas and messages. Most software programs have heading levels built in to a style that the writer may select. Using this pre-formatted style ensures consistency throughout a message.

Serif vs. Sans Serif Font

When choosing a font type, the first thing to decide is if you need a serif or sans serif font. What is a serif? A serif is the small strokes on a a font (as seen in Figure 1).

Figure 1. Serif versus Sans Serif fonts

While there is some debate on the topic, the general recommendations are as follows:

- When writing for print media, use a serif font for your body text and a sans serif font for headings.
- When writing for digital media, use a sans serif font for your body text, and you can use a serif or sans serif font for headings.

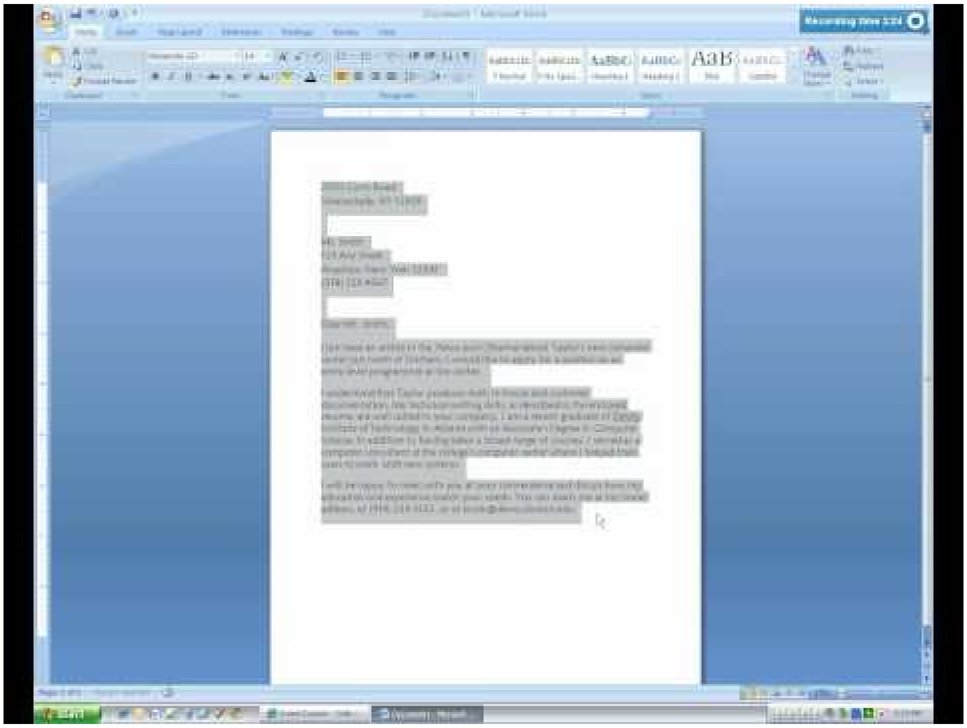
Font type impacts the selection of font size. For most business writing, the optimal fonts size is 10 or 12.

Microsoft Word

This page provides guidance on how to use key features of Microsoft Word to create your business communication. If you can envision the page layout, there is a way for the software to do it. If the instructions are not found below, it is likely someone has made a YouTube video of just what you want to do.

Getting Started in Word

The following six-minute video demonstrates how to use Microsoft Word to create a letter. Software versions do change over time, so worry less about the details and more about how the information is entered. Each new version retains the core features of all versions before it, so it will still be easy to use with a few adjustments. There are some differences when working on a PC versus an Apple product. These instructions are for the PC, but the basic idea is the same.



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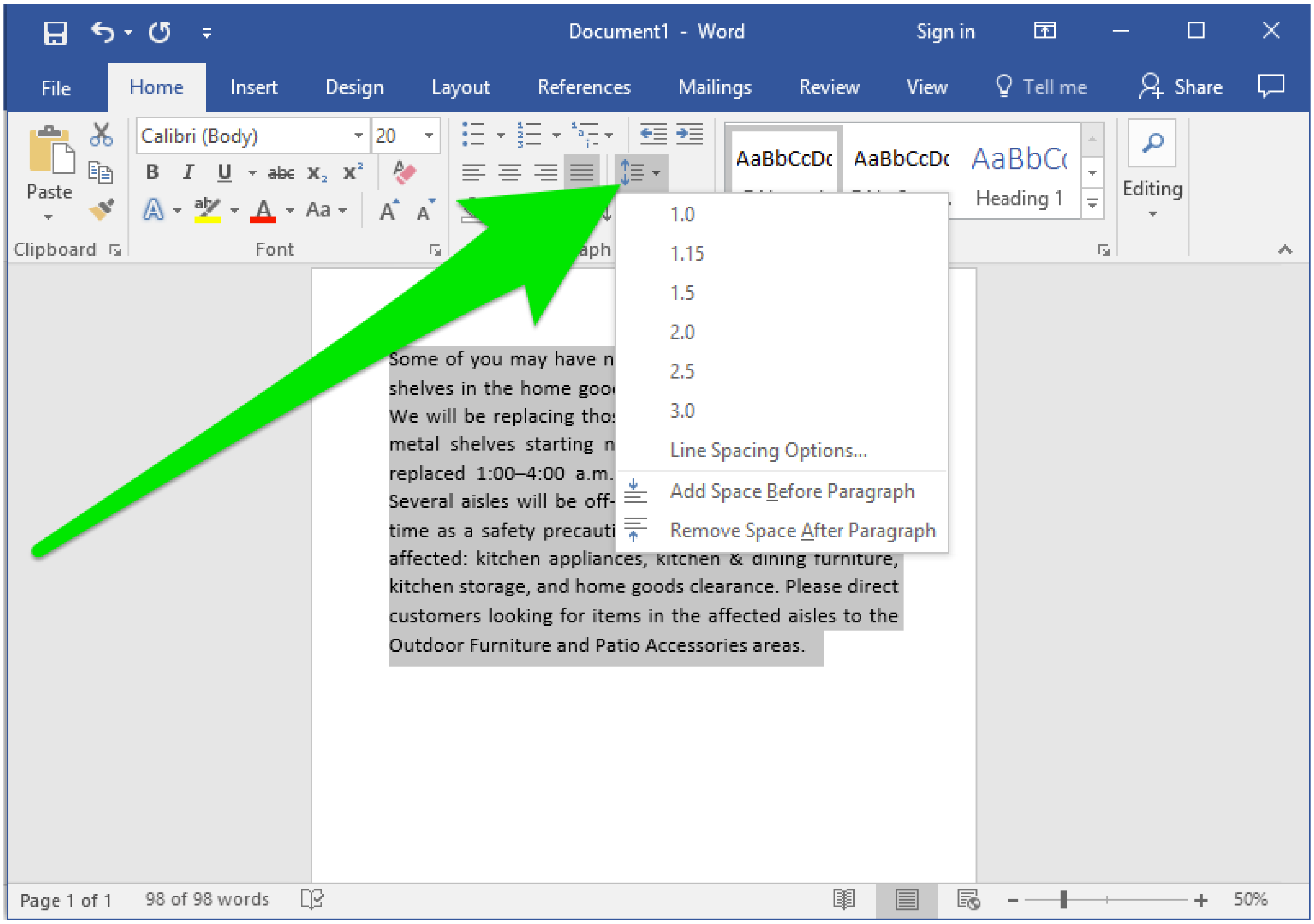
Line and Paragraph Spacing in Word

Business communications, unlike writing intended for an academic setting, use single line spacing, as seen in the images below. Both kinds of documents use a left alignment or justification, while business documents might have an unjustified right edge (which leaves line-ends ragged) or fully justified blocks, which are nice and neat on both right and left but might do some funky things with internal spacing to achieve the neatness.

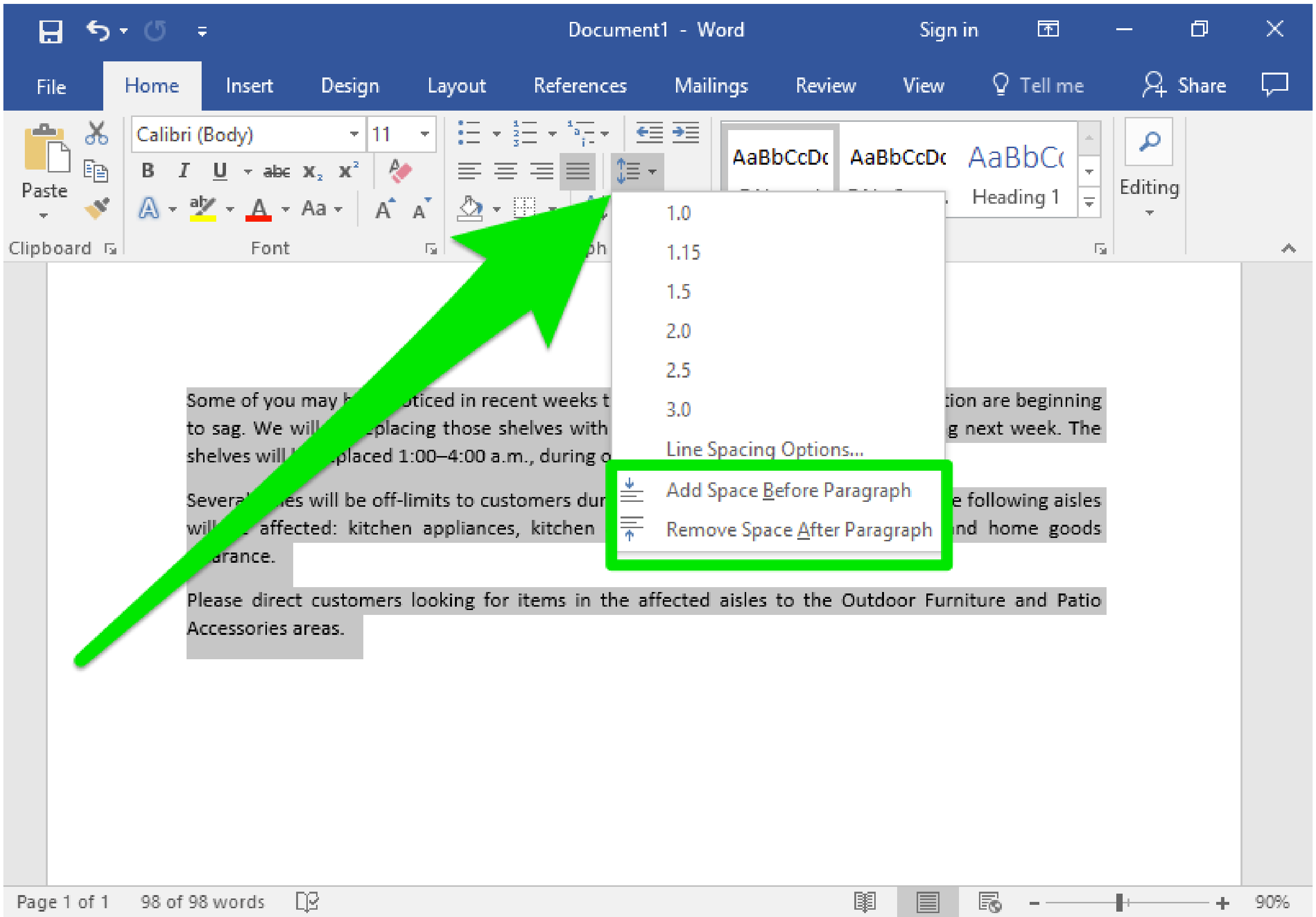
Avoid	Try
Some of you may have noticed in recent weeks that the shelves in the home goods section are beginning to sag. We will be replacing those shelves with new, reinforced metal shelves starting next week. The shelves will be replaced 1:00–4:00 a.m., during our least busy hours. Several aisles will be off-limits to customers during that time as a safety precaution. The following aisles will be *2.0 line spacing*	Some of you may have noticed in recent weeks that the shelves in the home goods section are beginning to sag. We will be replacing those shelves with new, reinforced metal shelves starting next week. The shelves will be replaced 1:00–4:00 a.m., during our least busy hours. Several aisles will be off-limits to customers during that time as a safety precaution. The following aisles will be affected: kitchen appliances, kitchen & dining furniture, kitchen storage, and home goods clearance. Please direct customers looking for items in the affected aisles to the Outdoor Furniture and Patio Accessories areas. *1.0 spacing*

To change the line spacing, select the lines you want to change. Then go to the Home tab and find the line spacing button in the Paragraph section. The line spacing button triggers a dropdown menu from which you can select a line spacing.



The numbers in the line spacing dropdown menu reflect how much the line spacing will increase relative to the size of the line. For example, a line spacing of 1 means the line spacing will be as large as one line, a line spacing of 2 means the line spacing will be the size of two lines, and so on.

You may have noticed that by default, Word adds a space between each paragraph. You can change the size of that space or eliminate it completely by changing the paragraph spacing. There is an option to Add Space Before Paragraph or Remove Space After Paragraph in the line spacing menu.



PRACTICE QUESTION

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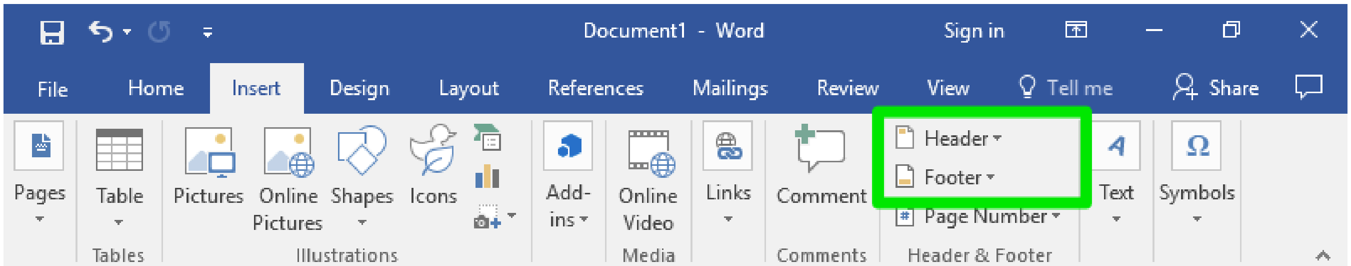
Headers and Footers

Headers and footers are the top-most and bottom-most sections of the document respectively. They are formatted as separate sections from the main document, and are often used to hold footnotes, page numbers, titles, and other information.

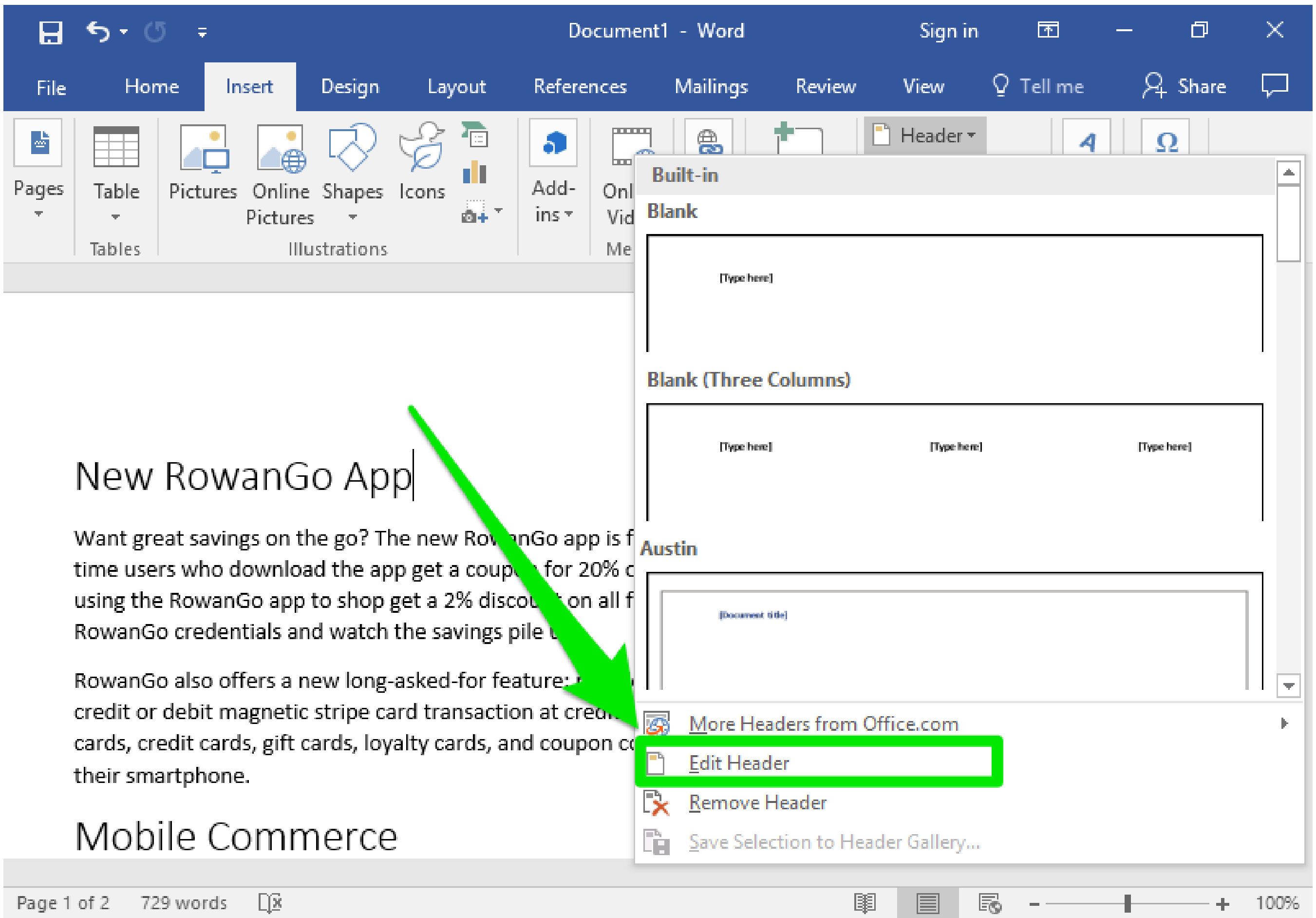
Your company likely has conventions and rules in place for the content of headers and footers and also for where page numbers are to be placed. There are, a few standard guidelines to note:

- Page numbers go in the header or footer. Once you decide where to put the page number, Word will keep track of it for you.
- Business letters do not have headers, and they get page numbers only if they run to three or more pages.
- Footers containing page numbers can start on the first page.
- For headers and footers in reports, see Module 6.

The header and footer controls are in the Header & Footer group of the Insert tab. (Insert > Header & Footer)



The Header and Footer options each contain a dropdown menu. Click one of the Built-in options to insert it, or select Edit Header (or Edit Footer) to edit the header (or footer).



The header/footer will be represented by a dotted line. While in header/footer mode (when the dotted lines are visible), you cannot edit the main text. You can go back to editing the main text by selecting the Close Header and Footer option on the right side of the ribbon.

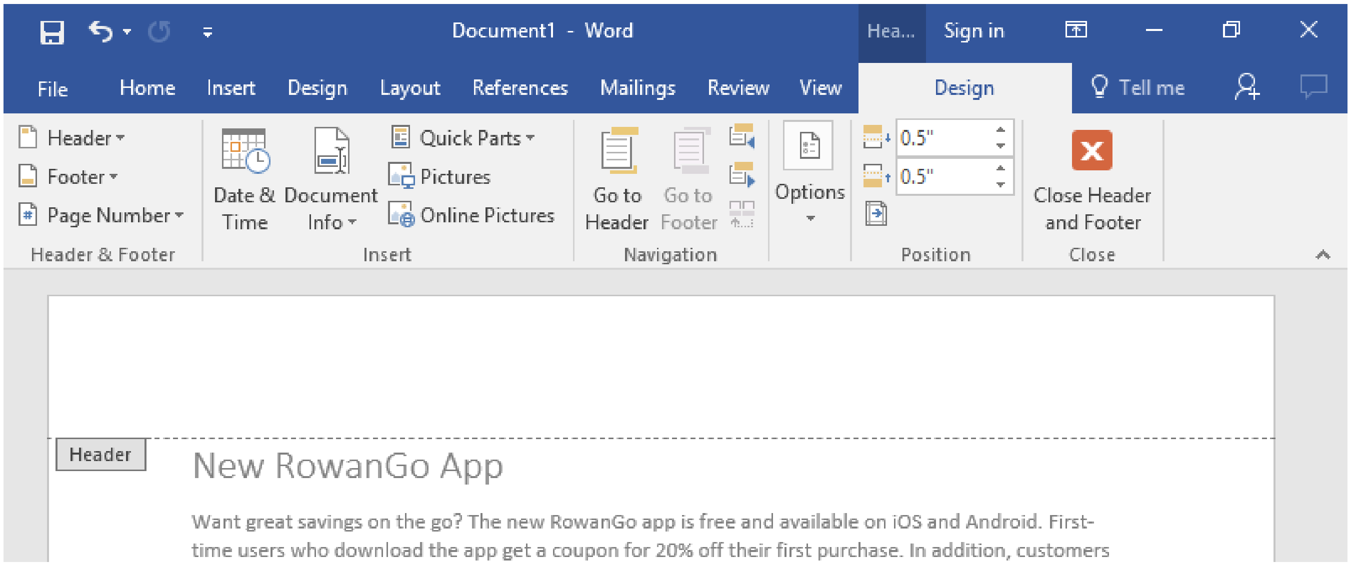


Figure 1. Header.

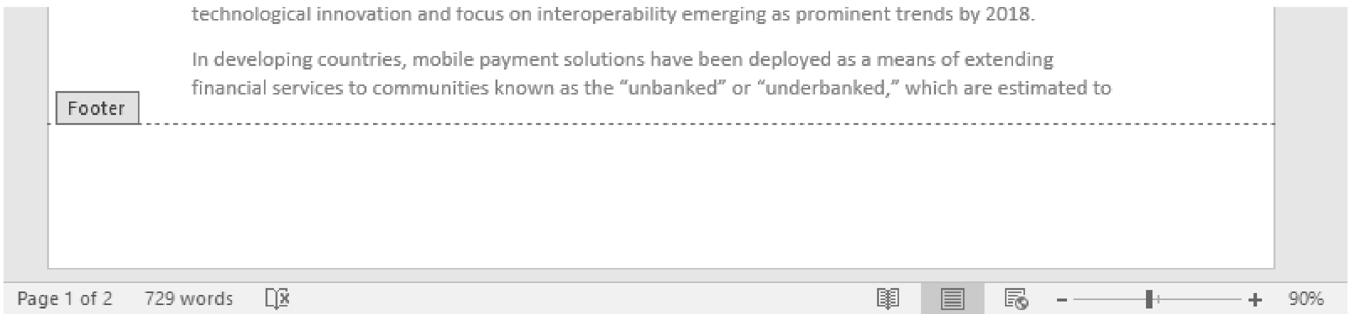


Figure 2. Footer.

The information in the header or footer is repeated in every header or footer in the document unless you check "Different First Page," which allows you to format the first page differently from the rest of your document. You can also create a break in your document where the header and/or footer change to accommodate a new section.

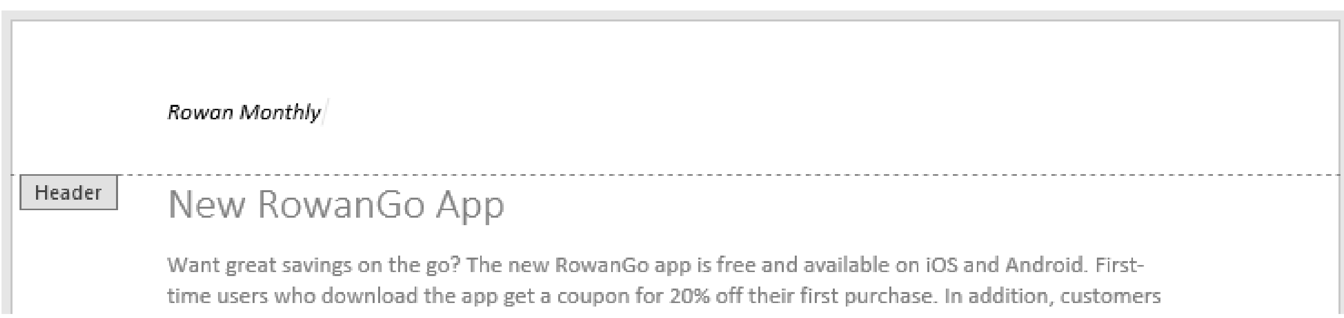


Figure 3. First page.

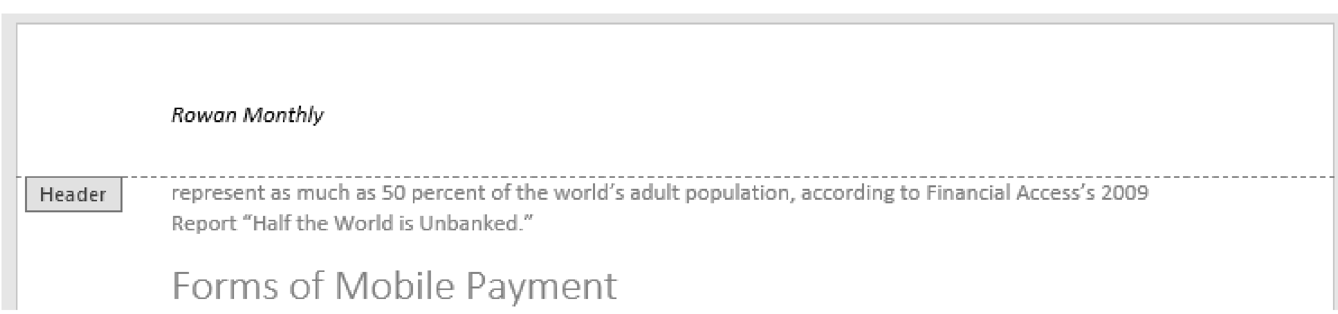


Figure 4. Second page.

Spell Check and Grammar Check

You've probably seen the red wavy lines indicating a misspelled word as you type a document. Sometimes, those red lines are helpful, saving you from making an embarrassing typo. Other times, they are annoying and distracting. In this section, we will cover how Spell Check works and how you can best use it to your advantage.

The spell checker tool compares every word you type against Word's dictionary or database of words. If a word isn't in this dictionary, the word is marked misspelled with a red underline. This means words that are correctly spelled may be marked as misspelled, especially brand names, specialized industry or scientific terms, and words in another language. With a little tweaking, you can teach Microsoft Word (and other Office programs) how to spell uncommon words and names you use regularly. That way, genuine mistakes are not lost in a sea of red underlines.

Most word processing software has spell and grammar check automatically turned on, so your errors are marked as you work. However, you can also run spell and grammar check manually by pressing F7, or by locating the Spelling and Grammar Check in the Review tab in the ribbon.

Sentence Length and Word Count

Earlier in this module concise writing was emphasized. How do you know your average sentence length? Word has a feature that helps track the lengths of sentences. Here's how:

1. Go to File > Options > Proofing and look for "When correcting spelling and grammar in Word."
2. Now check the box for "Show readability statistics."

Some online forms also require you to stick to a specific word count or whatever you enter will be cut off by the form's programming. In the Review tab in the ribbon, there is an option for word count that shows the number of characters (with or without spaces), words, and lines.

Google Docs

Working in Google Docs is similar to working in Microsoft Word. The only requirement is that you need a Google login to save and share your documents. This page provides guidance in how to use key features needed to create your business communication in Google Docs. If you can envision the page layout, there is a way for the software to do it. If the instructions are not found below, you can be certain someone has made a YouTube tutorial of just what you want to do.

Getting Started in Google Docs

A YouTube element has been excluded from this version of the text. You can view it online here: https://courses.lumenlearning.com/wmopen-businesscommunicationmgrs/?p=1600

Line and Paragraph Spacing in Google Docs

Business communications, unlike most college or high school writing, use single line spacing, as seen in the images below. Documents use a solid alignment left. The alignment along the right may be blocked, as seen or ragged.

Avoid	Try
Some of you may have noticed in recent weeks that the shelves in the home goods section are beginning to sag. We will be replacing those shelves with new, reinforced metal shelves starting next week. The shelves will be replaced 1:00–4:00 a.m., during our least busy hours. Several aisles will be off-limits to customers during that time as a safety precaution. The following aisles will be *2.0 line spacing*	Some of you may have noticed in recent weeks that the shelves in the home goods section are beginning to sag. We will be replacing those shelves with new, reinforced metal shelves starting next week. The shelves will be replaced 1:00–4:00 a.m., during our least busy hours. Several aisles will be off-limits to customers during that time as a safety precaution. The following aisles will be affected: kitchen appliances, kitchen & dining furniture, kitchen storage, and home goods clearance. Please direct customers looking for items in the affected aisles to the Outdoor Furniture and Patio Accessories areas. *1.0 spacing*

Change How Paragraphs Look

You can edit the text, paragraphs, spacing, and font using the toolbar bar at the top of a document.

1. On your computer, open a document in Google Docs.
2. Select the lines you want to change.
3. Click **Format** > **Line spacing**.
4. Select a line spacing option.

PRACTICE QUESTION

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Headers and Footers

Headers and footers are the top and bottom sections of the document respectively. They are separate sections from the main document, and are often used to hold footnotes, page numbers, titles, and other information.

Your company likely has conventions and rules in place for the content of headers and footers and also for where page numbers are to be placed. There are, a few standard guidelines to note:

- Page numbers go in the header or footer. Once you decide where to put the page number, Word will keep track of it for you.
- Business letters do not have headers, and they get page numbers only if they run to three or more pages.
- Footers containing page numbers can start on the first page.
- For headers and footers in reports, see Module 6.

Adding Headers, Footers & Page Numbers

In Google Docs, you can also add dates, titles, or names to every page in a document using headers and footers. Add or change headers & footers:

1. Open a document in Google Docs
2. Click **Insert** > **Header & page number**
3. Choose **Header** or **Footer**
4. Enter text into the header or footer

If you want the header or footer on the first page to be different different from the other pages, check **Different first page header/footer**. This option is only available for the first page; you can't create a unique header or footer for each page.

To add page numbers as your header or footer, select **Page number** in the dropdown menu instead of **Header** or **Footer**.

Spell Check and Grammar Check

Google Docs' Grammar Check is integrated with the Spell Check function. The Grammar Check feature underlines words that the application's engine tags as possible grammatical errors. For example, the Grammar Check will likely underline "its" if the engine thinks you typed the wrong form of the word in the context of the sentence. Open the "Did You Mean…" dialog box for the word, then correct the word if a correction is warranted. The Spell Check function works in the same way as in Word for misspellings, except that correct spellings of the word are presented in the **Change Spelling To** dialog box.

Sentence Length

Earlier in this module concise writing was emphasized. Google docs has a feature that helps track the lengths of sentences.

You can open the word counter in two different ways:

- Click on the tab at the top of the page titled **Tools**. Find **Word Count** in the drop-down menu and click on it.
- Use a keyboard shortcut. For PC users, press **Ctrl+Shift+C**. For Mac users, press **Command+Shift+C**

Once you've opened the word counter, a dialogue box will appear listing the number of pages, words, characters, and characters excluding spaces in your document.

PUTTING IT TOGETHER: WRITING IN BUSINESS

Let's look back at Dennis's email from the beginning on this module. How things could have gone better for Dennis and for Diversity Day if he had actively followed the writing process steps we just learned?

Plan

Dennis should have prepared for this direct message to confirm the speaker and get the title for the talk. Rennata, the receiver, will either be pleased or neutral about the details for her talk and the request for the title of the talk. If Dennis could do it over, here is the outline he might create:

Components	Notes
News	Need talk title and confirm diversity day arrangements. Thanks.
Reasons	April 23 the day. Be here at 8:30. Done by 3:30. Need title of your talk for brochure publ on April 16.
Goodwill and Action	Benefit she'll bring to event. Date to confirm April 15.

Write

Dennis's preparation would help him see that his original message included too much irrelevant detail that hid his full message. He should focus on accomplishing the task he was asked to do and not put in all that other information.

Revise

After he wrote it, then he would revise the message with attention to the layout, white space, you-view, and proofreading to say the least. Here is what he could have produced, if only he had taken just a little more time to focus on his message.

Date: April 1, 2018

To: Rennata Johnson, CEO of Diversity NOW <rjohnson@diversitynow.com>

From: Dennis Hoffman <shoffman@qcom.com>

Re: Diversity Day

The details you requested for your much anticipated April 23 talk follow. To promote your talk, could you please provide the title?

Your expertise in corporate diversity training makes this a great day. Here is your schedule for the day:

- Opening coffee, 8:30 a.m., West Conference room. Leadership team.
- First session, 9 a.m., Theater room. All associates
- Lunch and message time, 11 a.m. On your own
- Second session, 1:30 p.m., Theater room. All associates
- Debrief, 2:30 p.m. West Conference room. Leadership team.

The details for the day's brochure must go to the printer a week ahead. Could you please provide the titles to include? If there is any other information you think important, please let me know.

Your reputation and experience means so much to the employees of QCom. Please send me the titles by April 15. I look forward to meeting you personally.

Dennis

dhoffman@qcom.com

303-101-3843

Some of the improvements Dennis made

- Spell out the date to make is easy for the reader. April 1, 2018
- Respect the speaker by spelling her organization's name right. Diversity NOW
- Provide a subject line that helps the speaker with a bit more detail: QCom Diversity Day Details and Confirmation Request
- Start with the main idea and focus on the receiver: The details you requested for your much anticipated talk follow. To promote your talk, could you please provide the title?
- Create a visual layout for the message that makes the detail easier to find. Use of paragraphs. Use of lists.
- Continue focusing on the reader with a you view. Starting more of the sentences with "you" or the topics Rennata cares about.
- Use parallel structure to help detail stand out. In bullet list.
- Create focus and action in the closing paragraph. Specific speaker compliment and specific reminder date.

MODULE 3: WRITTEN COMMUNICATION

WHY IT MATTERS: WRITTEN COMMUNICATION

Why learn to write effectively?

What is the cost of poor communication? It is difficult to know exactly, but estimates suggest the cost could be billions of dollars and worker hours. Poorly-worded or inefficient emails, incessant text messages, memos and emails that go unread due to poor structure and writing, snoozy slide presentations, lack of understanding of the audience—all of these examples result in inevitable costs.

The waste caused by poor communication is real—in reduced productivity, efficiency, and lost business. In more personal terms, the losses are measured in wasted time, work, money, and ultimately, professional recognition.

REDUCING UNNECESSARY OVERTIME

Joanne supervises thirty-six professionals in six city libraries, and in recent months, she has noticed a ten percent increase in claimed overtime. To cut the costs of unnecessary overtime, she issued this one-sentence memo to her staff:

> When workloads increase to a level requiring hours in excess of an employee's regular duty assignment, and when such work is estimated to require a full shift of eight hours or more on two or more consecutive days, even though unscheduled days intervene, an employee's tour of duty shall be altered so as to include the hours when such work must be done, unless an adverse impact would result from such employee's absence from his previously scheduled assignment.

After the thirty-six copies were sent out, Joanne's office received twenty-six phone calls asking what the memo meant. What the ten people who didn't call about the memo thought is uncertain. It took a week to clarify the new policy.

Advances in technology have opened the door to a myriad of communication vehicles in business today. In any written business communication the most important aspect is to clearly convey the main ideas and purpose of the message to the audience. This is closely followed by how it is written and then the method of sharing the message. Harmonizing these three characteristics will determine how effective the message is when it is received.

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CHANGING COMMUNICATION CHANNELS

What you'll learn to do: Discuss the shift from paper to digital communication

We will examine both traditional and digital business communication techniques.

We will identify the most common form of each and discuss the benefits of each. We will discuss how the growth of digital communication has transformed how we work today.

LEARNING OUTCOMES

- Discuss the shift from traditional to modern communication methods
- Identify benefits of digital communication methods
- Identify benefits of traditional communication methods

Modernizing Business Messages

The advances in information technology, and especially the widespread use of the Internet, have brought dramatic change to the way business communication is conducted. This in turn has precipitated change in the very way that we work today.

Traditional written business communication consisted of letters, memos, brochures, etc. that all shared the same media: paper. Modern written business communication consists of those as well but now is utilizing digital media. The move to digital communication methods has seen expanded communication techniques such as email, instant messaging, texting, posting, chatting and more. We will discuss these in more detail later.

PRACTICE QUESTION

An interactive or media element has been excluded from this version of the text. You can view it online here: https://courses.lumenlearning.com/wmopen-businesscommunicationmgrs/?p=1030

Digital business communication has not only seen the expansion of communication in general but has transformed the way we work thanks to near instant methods of communication. First, since we are now "always" connected, there is the tendency to always be at work. But this change in communication has also brought some good news as traditional work hours have given way to flexible work time for many businesses. Secondly, we have seen a shift from direct manager-to-employee reporting relationships to a more team-oriented, "flattened" collaborative organizational structure. Third, where we work has become less structured as well with the advent of virtual workplaces and remote employees.

DELL'S CONNECTED WORKPLACE

The Dell company, known for computers and electronics, is a prime example of the impact electronic communication has had on modern work practices. The increased use of digital communication platforms to conduct work allowed Dell to develop the Connected Workplace program. This program promotes employees to work remotely, meaning employees can work from anywhere in the world as long as they have internet access.

Some of Dell's North American employees who opted to work remotely relocated to ski areas in Canada to take advantage of their mobile status. Some employees work Sunday through Thursday from 12:30pm to 9:30pm so as to better coordinate with team members based in other time zones. This then allows them to spend their morning and weekend free time on the slopes. In 2012, Dell expanded their "Flexibility and Mobility" program to seventy three sites in twenty nine countries representing twenty five percent of eligible employees (Note: "The Global Impact of Remote Work," Remote.co, September 2016.).

Digital Communication Methods

The benefits of digital communication for society in general are nicely stated by Mitchell Kapor (Note: Kapor, Mitchell. *Electronic Frontier Foundation Information*, 1993.):

> Digital communications media are inherently capable of being more interactive, more participatory, more egalitarian, more decentralized, and less hierarchical. As such, the types of social relations and communities which can be built on these media share these characteristics.

For the professional business environment, the four primary benefits of digital communication methods are as follows:

- Communication is instant and fast-paced.
- Communication is extensive.
- Communication is convenient.
- Communication contributes to positive social change.

Instant and Fast-Paced Communication

Communication using digital techniques is instant. As soon as the sender hits the **Submit**, **Enter**, or **Send** key, the message is available to the audience in a matter of microseconds. The business benefit of instant communication is obvious—little to no delay of valuable information being sent to individuals, customers, or the organization. Responding to a competitor's new product release, informing colleagues of project status, scheduling an "all-hands" meeting, and acknowledging a customer complaint are all accomplished nearly instantly.

Extensive Communication

Another benefit of digital business communication is that it is extensive. One email message or text message can be easily routed to thousands of employees at the same time. A post on social media can be seen by millions of customers. Never before have we had the "reach" that a single digital communication can provide. Additionally, digital communications can be extensive in their contents as well; while sending a printed forty-page report by mail has associated costs, it's virtually cost-free to send the same content digitally.

Convenient Communication

Digital business communication is convenient, which serves to foster better communication. Computer programmers can relay information to their development team with a few mouse clicks, which means that they are more likely to do so. Additionally, the fact that digital communication is instant and extensive also contributes to the convenience of using these techniques.

Communication for Change

Finally, the advent of digital communication in the business environment has contributed to positive social change and served to change the environment itself. Always being connected may not seem to be a benefit at first glance, but if that factors into more flexible work hours, employees may be happier at work. A team-oriented workforce, which tends to foster sharing and support among team members, has been shown to contribute to greater employee productivity and success. And who does not appreciate a shorter—or even non-existent—commute? Virtual and remote offices have also been credited with tangible benefits to employees.

PRACTICE QUESTION

An interactive or media element has been excluded from this version of the text. You can view it online here: https://courses.lumenlearning.com/wmopen-businesscommunicationmgrs/?p=1030

Traditional Communication Methods

Traditional methods of business communication tend to mean paper-based messages such as formal letters, brochures, reports, proposals, and notes. Based on the advantages of using digital communication discussed above, why would we wish to continue to use traditional means?

There are several reasons why these traditional methods of communication still have their place:

- Reader preference
- Storage and archive
- Security
- Convenience
- Perception

Reader Preference

One of most important elements of any type of communication is how effective the message is. Communication is most effective when the message is clearly received by the intended audience. Some people prefer to read information from a sheet of paper rather than a device screen or prefer to read a novel from a hard-bound book versus a on a tablet device. Human senses come into play in communication, and touch is a very strong human trait. In communication, it's all about the receiver instead of the sender, so by putting the receiver of the communication first, the message will be more effective.

Storage and Archive

Another advantage of traditional communication methods is in the storage of documents. Many organizations today believe in having a hard-copy document to back up electronic records. Servers and mainframes have been known to crash with an ensuing loss of data. Despite the fact that emails, texts and other digital communication have been found to be legally binding, the storage and archiving of paper documents continues to be important since electronic storage is not foolproof.

Security

A third advantage of traditional communication techniques is closely related to data storage: data security. Data breaches and malicious hacker attacks have shown that no electronic record is completely safe, even with firewalls and cyber-security software.

Convenience

While convenience was listed above as a benefit of digital communication, it is also a benefit of traditional communication. In order to open an email or read a text or scan a social media post, you must have a functioning device that is connected to the internet. We all know that there are times when we are unable to be online thanks to poor signal coverage or the dreaded dead battery. There are even times when we wish to be disconnected on purpose to have a bit of a break.

Perception

Finally, traditional communication methods can make a good impression and improve the receiver's perception of the message sender. How many of us find it a little overwhelming to wade through a mountain of email, texts and social media posts every day? A simple thing like a business letter on upgraded stationary has been shown to differentiate a sender from others. A formal written proposal sent to a customer usually gets opened, in contrast to an email that is flagged for later or marked as unread. A hand-written note is almost always opened right away because of its novelty.

PRACTICE QUESTION

An interactive or media element has been excluded from this version of the text. You can view it online here: https://courses.lumenlearning.com/wmopen-businesscommunicationmgrs/?p=1030

INTERNAL EMAILS AND MEMOS

What you'll learn to do: Compose emails and memos intended for an audience within the same company or team as the writer

Since email and memos are part of the daily workflow it is important to be aware professional standards that need to be followed in today's workplace communication. When considering these standards of professionalism, what are the key features of an email intended only for internal distribution? How do we write an internal email message? How do we write an internal memo?

LEARNING OUTCOMES

- Describe the professional standards of intra-office emails
- Identify common types of internal emails
- Identify key features of the structure and format of internal emails
- Write an internal email
- Identify key features of the structure and format of memos
- Write an internal memo

You probably learned about table manners, thank-you notes, and other forms of etiquette when you were younger. Many people believe that the way you conduct yourself says a lot about who you are in life, and by extension, in business. Although many companies have a casual dress code, don't be quick to assume that protocol and established practices aren't important. It would be easy to misinterpret lack of formality as lack of professionalism.

Email has become the most accepted method of communication in most businesses, whereas text messages, instant messages, and messages through social networks can also be commonplace depending on the company. Since the use of these channels varies by company and even by department, it is crucial to be aware of etiquette when using any of these methods of communication.

One way to practice etiquette when communicating in a business setting is to take time to choose your method of communication carefully. Letters, memos, proposals, and other written communication are considered formal, whether they are sent on paper or transmitted via e-mail. However, text messages, instant messages, and social networking are considered informal methods of communication and are best used to communicate less-formal information, such as a the change in a meeting time if schedules have been adjusted during a factory tour. Text and instant messages should never be used to communicate company policies, proposals, pricing, or other information that is an important part of conducting business with customers.

It's also worth noting that in all these methods, your communication is permanent, so always take the time you need to write a complete and accurate message. The following tips for electronic communication will help you be viewed as professional.

THINGS YOU SHOULD DO

- Do use an email subject line that clearly tells the recipient about the content of the email. For example, a title like "New Promotional Materials" might be too vague if you have several promotions running at the same time, instead try "Spring 2018 Housewares Promotion."
- Do create a short, concise message that uses proper grammar and spelling—use spell-check to be sure all words are spelled correctly. Use uppercase and lowercase letters as grammar dictates.
- Do proofread carefully. Look for missing words or extra negatives (such as not), which make your meaning the opposite of what you intend.
- Do use email, text messages, and instant messages when appropriate, according to your company's practices. Use with your customers only when you need to communicate factual information such as to confirm meeting date, time, and location.
- Do use social networking sites to join the conversation and add value—you can build your personal brand by creating a blog or joining a professional conversation on social networking sites such as Twitter or Facebook.

THINGS YOU SHOULDN'T DO

- Don't use all capital letters in an email; it will appear that you are shouting or angry.
- Don't use "Reply to All" unless it's absolutely necessary that all the recipients see your response. Be selective to avoid mailbox overload. Use your best judgement about whom to cc.
- Don't send an email, text message, or instant message when you are angry or in an extreme emotional state. Take the time to think about what you send because you can't take it back after it's sent.
- Don't use abbreviations like "ur," "2b." This is not appropriate language for business communication. It's easy to forget to adjust our language for professional purposes since we use electronic communication methods with friends and acquaintances.
- Don't use company email, text message, or instant message accounts to send personal correspondence. All communication that takes place on company hardware and servers is property of the company.
- Don't use text messages, instant messages, or social networks to communicate information such as pricing, proposals, reports, service agreements, and other company information that should be sent using a more formal method.

PRACTICE QUESTION

An interactive or media element has been excluded from this version of the text. You can view it online here: https://courses.lumenlearning.com/wmopen-businesscommunicationmgrs/?p=1033

Internal Emails

Common Types of Internal Emails

In the past, the standard workhorse for inter and intra-office communication was the *memorandum* or *memo*. According to Merriam-Webster, a memo is “a usually brief written message or report from one person or department in a company or organization to another.” For all intents and purposes, the email has become the memorandum of modern business. Internal business emails can be used to communicate almost any and all types of information.

An internal email can be created in the form of a newsletter, event notification, company policy change, announcement, meeting request, status update, appreciation, etc. In other words, email can be used for any number of purposes. This is perhaps the reason that many employees today feel inundated with the daily barrage of email.

Here is an example of a very simple message informing of an agenda change for an upcoming meeting:

From: John Jaurès [johnjon@productive.com]

Sent: Tuesday, October 21, 2017 10:13 AM

To: Team Members

Subject: Changes to Agenda

Hi Everyone,

Here are some additions to the agenda for our meeting on Thursday:

- New software installation
- Changes to protocol
- Email monitoring policy

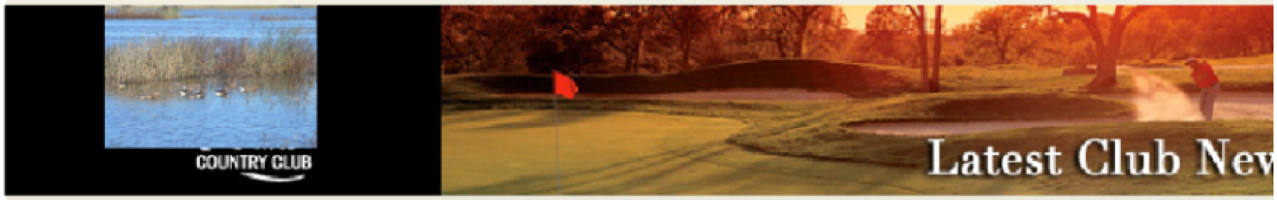
If you have any additions, please let me know by the end of day tomorrow.

Thanks,

John

Here is an example of an internal newsletter email:

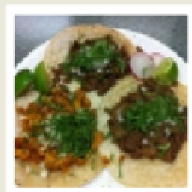
From: CanyonCountry Club
Subject: Weekly Update from CanyonCountry Club
Date: April 20, 2018 at 7:30 AM
To: georgiegirl@me.com



Taco Night Next Tuesday

Posted on 4/19/18 by Robert
- Executive Chef

Taco and salsa bar in the bar & grill from 5:30 - 8:00 p.m., Tuesday, April 24. $7 per person.

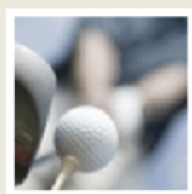


MORE

Callaway Demo Day

Posted on 4/18/18 by
- Head Golf Professional

Come check out the latest equipment Friday, May 4 from 2:00- 6:00 p.m. The Callaway club fitter will have a launch monitor and all the latest equipment including the new Rogue t...



MORE

Cinco de Mayo Scramble

Posted on 4/17/18 by
- Head Golf Professional

Let's celebrate Cinco de Mayo on the golf course! Saturday, May 5, 3:30 p.m.shotgun, play a 9 hole scramble and enjoy a taco bar afterwards. Entry fee is $25 Members/ $35 Members' guests. Gree...

MORE

UPCOMING EVENTS

Men's Invitational
Date: 4/26/18

Thursday - Saturday, April 26 - 28. The golf course will be closed to all other golf. No happy hour Friday night.

Burger Night
Date: 4/29/18 5:30 - 8:00 p.m.

Choose one of Chef's signature burgers or create your own masterpiece! Complimentary beverages and ice cream for the kids. $8.99 or $11.99 burger & beer combo.

Aerification
Date: 5/8/18

The course and clubhouse will be closed Tuesday & Wednesday, (May 8 & 9) for aerification. Thank you for your understanding.

Almond Creek Golf Outing
Date: 5/8/18

Just 3 weeks away! Sign up now for this fun outing while Canyon Oaks is closed for aerification on Tuesday and Wednesday, May 8 & 9. $149 includes: (2) Rounds of Golf w/ Cart, Range B...

Here is an example of an internal email memo:

From: daraujo@teamcloud.com [mailto:daraujo@teamcloud.com]
Sent: Tuesday, February 08, 2017 2:06 PM
To: Eddie Bangston

Subject: Team Cloud Employee Benefits

WELCOME TO TeamCloud!

Team Cloud is committed to providing our employees with the highest quality of benefits at an affordable price.

In our efforts to make your orientation a pleasant one, we have implemented a web based employee self-service system to assist you in completing the new hire process, including benefits enrollment.

A personalized account has been created for you. To login, please visit

www.mybenefits.com and login using the User ID and Password provided at the end of this email.

Before logging in, please be sure to disable any Pop-Up Blockers or adjust your settings to allow pop-ups from mybenefits.com. Also, it is helpful you have all your dependents' social security numbers, birthdates, etc.

Please log in as soon as possible. This system is designed to provide you with information regarding our benefit programs to make the enrollment process more efficient. If you need assistance, please don't hesitate to contact me.

Once again, welcome to TeamCloud!

Best Regards,

Derrick Araujo

Human Resources Generalist

866.419.4111

User ID: ebangston

Password: teamcloud1

PRACTICE QUESTION

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The Structure and Format of Internal Emails

There are six primary features of an internal business email:

- Subject line
- Greeting
- Opening
- Body
- Closing
- Signature

Email Subject Line

The subject line is one of the most important features of any business email message. It should quickly and concisely summarize the contents of the email in such a way as to make the recipient want to open the message (remember an inbox is a sea of subject lines- make yours stand out). Try to use verbs in the subject line wherever possible to get maximum attention: "Attend Friday's call—Important," "Respond to this customer ASAP," "Your initiation is about to expire—Please get back to us!" There's not always a viable verb, especially if your email covers multiple topics ("Changes in Management and New Produce Line"); however, you should still be concise: no one wants a full email in the subject line.

Greetings

The greeting is really just a matter of good etiquette. Your goal is to sound professional yet friendly. If the recipient is a teammate or colleague, a less-formal, friendly greeting is appropriate: “Hi John”; “Good Morning Ben.” If your audience is outside your department, in a different location, etc. you would be more formal, “Dear Cathy.”

Openings

You might need an opening paragraph if the message is a long one with many details. Make sure you make it clear to the recipients why they are receiving this email. Think of an executive summary where you are condensing down to the gist of the message without all of the details. This is especially helpful for messages to senior management, who may not be interested in all of the finer points.

Body of the Message

The body of your message should be concise and to the point. As with any writing, always keep your audience in mind. It is common for people not to read all the way though long emails or only read with half of their attention. Ask yourself whether you are conveying your message in a way that will be best understood and minimize misinterpretation. Are there plentiful facts, background information, or documentation that must be included? Since emails are generally short, you must decide what information should be included to write a complete and accurate message and what information would be best suited as an attachment.

As you write the body of your message, you might notice how challenging it is to include as much information as possible while also trying to keep the email short. Are you writing in long, compound sentences? Take note of your sentence structure and make sure each sentence has one clear idea or connected ideas to make the sentences more digestible. To summarize information, you can also use bullet points in your message to keep it brief but thorough.

> Note: If you find that your email is becoming too long, with multiple pages of information, consider re-writing your email as a memo or report. You can then send your longer report or memo as an attachment with a short email introducing the attachment and its context.

Closing

The close of your message should include a call to action with specific desired outcomes and dates. Ask yourself why you wrote this message in the first place. Why is this message important and what do you want the reader to do? By when? For example you may want a response from the recipient such as “Please confer with Jane and respond to the team no later than June 2nd.”

Signature

Your signature should contain full contact information including your name, title, address, voice number, and email address. Remember, this message is not a personal note, it is from the organization.

We are going to see a host of email examples in the next sections.

PRACTICE QUESTION

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Writing an Internal Email

Think about your message before you write it. Don't send emails in haste. First, decide on the purpose of your email and what outcome you expect from your communication. Then think about your message's audience and what they may need in order for your message to have the intended result. You will also improve the clarity of your message if you organize your thoughts before you start writing. Jot down some notes about what information you need to convey, what questions you have, etc., then organize your thoughts in a logical sequence. You can try brainstorming techniques like mapping, listing, or outlining to help you organize your thoughts.

Reflect on the tone of your message. When you are communicating via email, your words are not supported by gestures, voice inflections, or other cues. This makes it easier for someone to misread your tone. For example, sarcasm and jokes are often misinterpreted in emails and may offend your audience. Similarly, be careful about how you address your reader. For instance, beginning an email to your manager with "Hey!" might be perceived as being rude or presumptuous (as in, "Hey you!"). If you're unsure about how your email might be received, you might try reading it out loud to a colleague to test its tone.

Strive for clarity and brevity in your writing. Have you ever sent an email that caused confusion and took at least one more communication to straighten out? Miscommunication can occur if an email is unclear, disorganized, or just too long and complex for readers to follow easily. Here are some steps you can take to ensure that your message is understood:

1. Briefly state your purpose for writing the email in the very beginning of your message.
2. Be sure to provide the reader with a context for your message. If you're asking a question, cut and paste any relevant text (for example, computer error messages, assignment prompts you don't understand, part of a previous email message, etc.) into the email so that the reader has some frame of reference for your question. When replying to someone else's email, it can often be helpful to either include or restate the sender's message.
3. Use paragraphs to separate thoughts (or consider writing separate emails if you have many unrelated points or questions).
4. Finally, state the desired outcome at the end of your message. If you're requesting a response, let the reader know what type of response you require (for example, an email reply, possible times for a meeting, a recommendation letter, etc.) If you're requesting something that has a due date, be sure to highlight that due date in a prominent position in your email. Ending your email with the next step can be really useful, especially in work settings. For example, you might write "I will follow this e-mail up with a phone call to you in the next day or so" or "Let's plan to further discuss this at the meeting on Wednesday."

Format your message so that it is easy to read. Use white space to visually separate paragraphs into separate blocks of text. Bullet important details so that they are easy to pick out. Use bold face type or capital letters to highlight critical information, such as due dates.

A few notes of caution: do not type your entire message in capital letters or boldface—your reader may perceive this as "shouting" and won't be able to tell which parts of the message are especially important. Also, avoid using color to emphasize important information.

Proofread. Re-read messages before you send them. Use proper grammar, spelling, capitalization, and punctuation. If your email program supports it, use spelling and grammar checkers. Try reading your message out loud to help you catch any grammar mistakes or awkward phrasing that you might otherwise miss.

PRACTICE QUESTION

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Here is the same message using some of the simple tips we suggest:

To: Western Team

From: Jane Doe

Subject: Materials Needed for Wednesday Staff Meeting

Hi everyone,

For tomorrow's 3 p.m. staff meeting in the conference room, please bring 5 copies of the following materials:

- Your project calendar
- A one-page report describing your progress so far
- A list of goals for the next month
- Copies of any progress report messages you have sent to clients this past month

See you tomorrow—

Jane

LEARN MORE

You can find more writing tips visit this guide to effective email communication from the University of North Carolina at Chapel Hill.

WATCH IT

Here is a video that covers the basics of writing an email quite nicely.

Memos

Memorandums, or memos, are quite similar to email messages. Memos, like emails, also contain a "To" and "From," a meaningful subject line, and states the reason for the communication immediately in the message. Memos also require strong organization in the body of the message for readability, and a call for action at the end. However, memos differ due to stricter formatting conventions and do not require a closing phrase nor a signature.

Here is an example of a traditional interoffice memo:

To: Jason Harris
From: Olivia Alvarez
Date: March 1, 20XX
Subject: Employee Appreciation Spotlight

Jason,

A YouTube element has been excluded from this version of the text. You can view it online here: https://courses.lumenlearning.com/wmopen-businesscommunicationmgrs/?p=1033

Our yearly employee appreciation dinner will be held on Friday, June 10. Due to your excellent performance in the last year—especially your work in the Northwest Region!—we would like to feature you as one of our spotlight employees.

As a part of this spotlight, we would love to give everyone a chance to get to know you better. If you are interested, please write a short (250 words or less) paragraph about yourself. If you're not sure where to start, here are a few question prompts:

- What is your favorite hobby?
- What is your greatest personal achievement (outside of work)?
- What is your favorite thing to eat?

Please let us know if you're interested by March 15, and if you are, please submit your paragraph by March 30.

Looking forward to seeing you there!
Olivia

As you can see from this example, a memo has well defined formatting. The address block is always single-spaced and includes "To, From, Date, and Subject." The body of the memo is formatted in block paragraph structure, double-spaced between paragraphs. The author of this memo does a good job utilizing bullet points to further organize the information for ease of reading. Also notice the overall look of the text on the page with equal spacing for left and right margins.

PRACTICE QUESTION

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Write an Internal Memo

Similar to an email, you should pay attention to the following points when composing a memo:

- Audience
- Purpose
- Style
- Heading
    - Date
    - Subject Line
    - CC
- Body
- Format
- Closing

Audience

Think carefully about who needs to receive the information in your memo—do not automatically include the whole office. When deciding how formal or informal your tone should be, consider whether your recipients are supervisors, peers, subordinates, or some combination of those groups. And remember, your readers are busy. They don't have time to waste on long-winded, confusing, or disorganized information. That means your memo must be organized, informative, and succinct.

Purpose

The purpose of a memo could be to announce a change in policy, an upcoming event, or a personnel action. They may solicit more information or request that someone take action. They may be written to persuade someone to support an initiative or change a policy. They can also be used to thank or praise someone.

Style

The writing style seen in a memo is succinct and professional. You do not want to be pretentious or too formal if you are talking to your colleagues. Ostentatious language, jargon, or complicated syntax will make you sound stuffy and pompous. Instead, write short sentences in the active voice to maintain a cordial, straightforward, and conversational style. Generally, your tone should be neutral or positive, but there are cases where memos are used for complaints or reprimands. In these situations, use caution. You never know who will ultimately read the memo, so be aware of the effect of your words.

Heading

The heading should include:

- Date: Write the full name of the month (January 3, 2016) or its standard abbreviation (Jan. 3, 2016).
- Subject: Make the subject line concise and accurate, since that often determines where or how the memo will be filed and even if it will be read. (In some instances, this line will say "RE:" which is short for "Regarding").
- CC: List names of other people who will receive copies of your memo. The "cc" line can be placed in the heading, next to the heading, or at the bottom of the document. The term "cc" is short for "carbon copy,"

a holdover from the days when memos were written on a typewriter. Some writers now use a single “c” for “copy.” This line is optional; it won’t be found on every memo.

Body Paragraphs

The opening paragraph states your purpose for writing so that readers can quickly grasp the memo’s content and significance to them. Focus your reader’s attention on main ideas, not details and digressions. Be plain, direct, and brief and remember that most memos are less than a page.

Format

Decide on a pattern of organization that best suits your purpose. The two most common for memos are deduction and induction. A deductive style of writing a memo presents ideas in decreasing order of importance and assumes the reader is acquainted with the topic. Most memos use this pattern. To write in a deductive manner, place supporting facts in subsequent sentences for readers who are unfamiliar with the subject. Background information should be presented last. A memo written in an inductive fashion presents ideas in increasing order of importance. If you must give bad news or if your reader may not understand the main idea without prior preparation, use this form. Lead up to the most important idea and then present that idea at the end of the memo.

If your memo is more than two or three paragraphs, you may want to add body headings for your body paragraphs. Use headings that capture the section’s key topic and set them in bold.

Closing

Finish with a courteous and clear call for action. Tell your reader precisely what results you expect to follow from reading your memo. It may be helpful to include deadlines. Close the memo with an invitation to give feedback or request further information.

LEARN MORE

You can find more writing tips visit this guide to writing professional memos from Texas A&M University Writing Center.

WATCH IT

Here is a video that covers the basics of writing a memo quite nicely.

PRACTICE QUESTION

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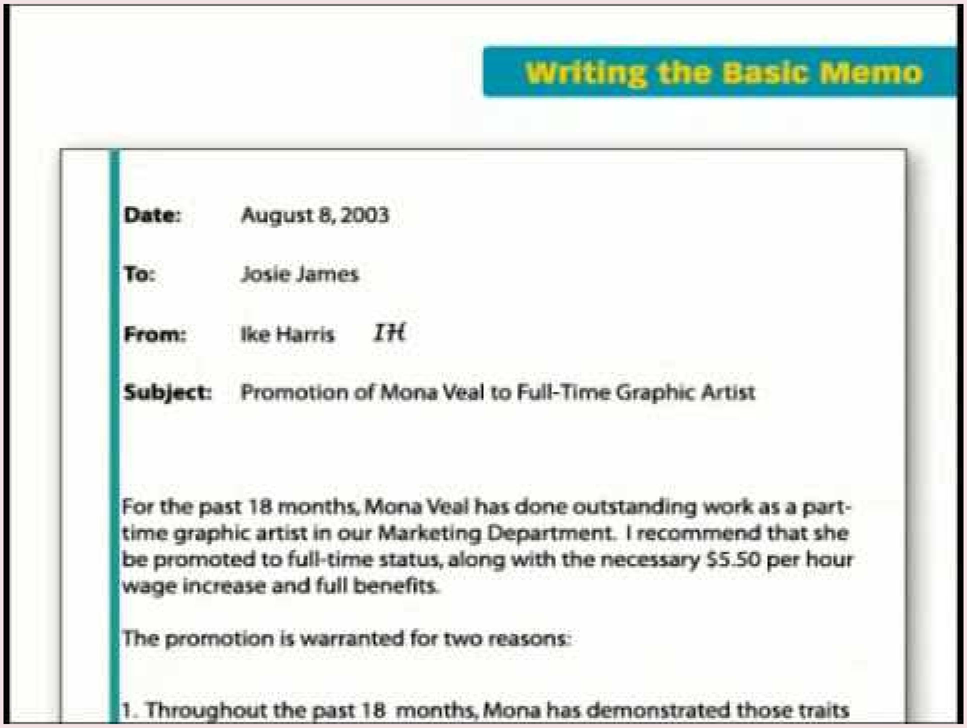

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OTHER INTERNAL COMMUNICATIONS

What you'll learn to do: Identify other common methods of professional communication

Where do email chains and LISTSERVs fit in to professional business communication? Can SMS text messages and Instant Messaging be used for professional purposes? What multimedia platforms are important today and provide value for the business professional?

LEARNING OUTCOMES

- Discuss the use of email chains and listservs
- Compare different methods of instant messaging and text services
- Identify professional applications of multimedia platforms
- Identify professional applications of social media networks

Email Chains and Listserv

An early digital method of professional group communication was through group or mass email chains. One advantage of using email is that the sender can easily add as many recipients as they want, either by using the To, Cc, or Bcc fields in the header. Any replies from the recipient(s) are stored under this original email and allow for interactive comments and replies from all parties in the designated message group. These stacked emails containing response messages on the same topic are called an **email chain**. However, more often you will hear it referred to as an **email thread** since the phrase "email chain" currently has a negative connotation because of its association with chain email practices. Chain emails are a type of email that asks recipients to forward the email to multiple people. These are considered to be a type of spam, or electronic junk mail, since they often contain false information, hoaxes, or a version of a Ponzi scheme.

One common use of email in retail is to provide information to customers, such as a sale promotion or recall of defective items. Since email is an affordable way to reach a large customer base, it is tempting to want to send out mass emails. Yet, a mass email approach to sending this type of information can quickly become unruly since there are so many recipients, and all participants are allowed to respond to the original sender or each other. This can lead to threads of responses being embedded within other threads, making it difficult to find specific information easily. Also, mass emails run the risk of violating recipients' privacy by disclosing all of the recipients' email addresses if the sender does not use the appropriate Cc or Bcc option.

To address these limitations and potential liabilities, companies have developed mailing list software, more commonly called a listserv. Listserv software was created to help manage larger numbers of users and for commercial purposes. Listservs provide a way to reach thousands of people via email when they subscribe to the listserv. Listserv software also manages the "subscribe/unsubscribe" administration and allows threaded discussion of the email content among the users on the list. The term listserv (written by the registered trademark licensee, L-Soft International, Inc., as LISTSERV) has been used to refer to electronic mailing list software applications which allow a sender to send one email to the list, which then transparently sends it on to the addresses of the subscribers to the list.

THE SIERRA CLUB

A modern and successful example of a company using listserv technology is The Sierra Club. The Sierra Club is a 600,000-member grassroots environmental organization. It is a nonprofit, member-supported public interest organization that promotes conservation of the natural environment by influencing public policy decisions: legislative, administrative, legal and electoral.

Manually-administered mailing list systems that rely on human administrators cannot keep up with the demand of such large groups. Tens of thousands of club members were excluded from receiving timely information and participating in email discussions while waiting for a human administrator to add them to the subscription list. With today's listserv software service, management and subscription procedures for mailing lists are simple and flexible, leading to increased growth and specialization of lists run on modestly priced hardware.

LEARN MORE

You can find more real world examples of companies using listserv software at the L-Soft Case Studies website.

PRACTICE QUESTION

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Instant Messaging and Text

Short Message Service (SMS), or text messages, have a place in the digital business communication toolbox. One useful feature of an SMS network is the ability to broadcast short bursts of information to mobile devices in the case of an emergency. There are other applications that fall into the "do not reply" category, such as one-way text messages that are widely used. We are now commonly contacted by our mobile phone carrier to be informed that a bill is due, our bank to let us know that an account is overdrawn, or a pharmacy sends us a reminder to pick up a prescription. Also, companies can take advantage of SMS technology for marketing campaigns in order to engage customers with automated prompts and responses.

Instant messaging (IM) is becoming increasingly popular as a business communication tool, especially for more informal communication. Some examples of widely used IM services are Google Talk (commonly called Google Chat), Slack, Jabber, Spark, and many more. The advantages of IM are that messages are sent and received instantly in real time and responses are organized in a "conversation" format that supports two-way communication. Colleagues working on a shared project but separated by distance can chat just as if they are in the cubicle next door. During conference calls with a customer, a sales team can pass information "privately" to one another to comment on what is being said.

The following example is of a private chat between Peter and Tom—sales people on a conference call with a prospective customer. Peter and Tom's conversation would be considered a backchannel chat. This is when individuals use networked computers (often via IM) to maintain a real-time online conversation alongside the primary group activity or live spoken conversation.

Peter: It's 1:00. When did our prospect say he would join us on this conference call?

Tom: Oh, he's logging in now.

Peter: Did I just hear him say that he was late because his call with our competitor ran over?

Tom: Yup. We'll need to change our agenda a bit. Why don't you ask him what he thought about the competitor's product?

Peter: OK, that worked. We have a better story for ease-of-use. Let's jump right to that portion of our presentation.

Tom: Sounds good.

Tom has left the session….

Another useful application of IM is interactive customer support. More and more, customers are invited to chat online with a specialist while visiting a company support web site, or when they are on hold on the phone.

When using IM and SMS communication tools, it is important to remember that even though these messaging systems feel more informal, you are still acting in a professional setting. When chatting across an internal IM system with a coworker who is a personal friend, it's likely acceptable for you to omit capitalization and punctuation marks. However, when talking with a customer or with coworker or manager about a company-related topic, you should to communicate in a professional manner.

COMPARE AND CONTRAST

Take a look at these IM conversations and compare the language used in each:

Casual Conversation

Camila: hey question do you still need an ID number in each order? because right now none of these have any of those and I'm not sure whether I should put them in
Annie: yeah, there should be
Camila: cool cool i'll add them
Annie: thanks bro

While IM and SMS are great digital communication tools, there are some disadvantages to these methods. Some companies do not even allow the use of them due to security and liability concerns. Sending company information

Professional Conversation

Camila: Hey, I'm looking over the order forms you sent me, and I had a quick question. Do you still need an ID number in each order? Because right now, none of them have one, and I'm not sure whether I should put them in.
Annie: Oh, right. Yes, there should be an ID number on each.
Camila: Perfect. I'll add them to the forms then.
Annie: Thank you so much!

If Camila and Annie are close friends working together, then the first conversation is a perfect use of IM, especially since both are using the same casual manner. However if they had a more professional relationship (or if only one of them were using causal conversation), then this would be a poor usage of IM.

over public IM services could be risky. Also, IMs and texts create distraction for many employees, especially if engaged in a conversation with an important customer or trying to IM while driving.

PRACTICE QUESTION

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Multimedia Platforms

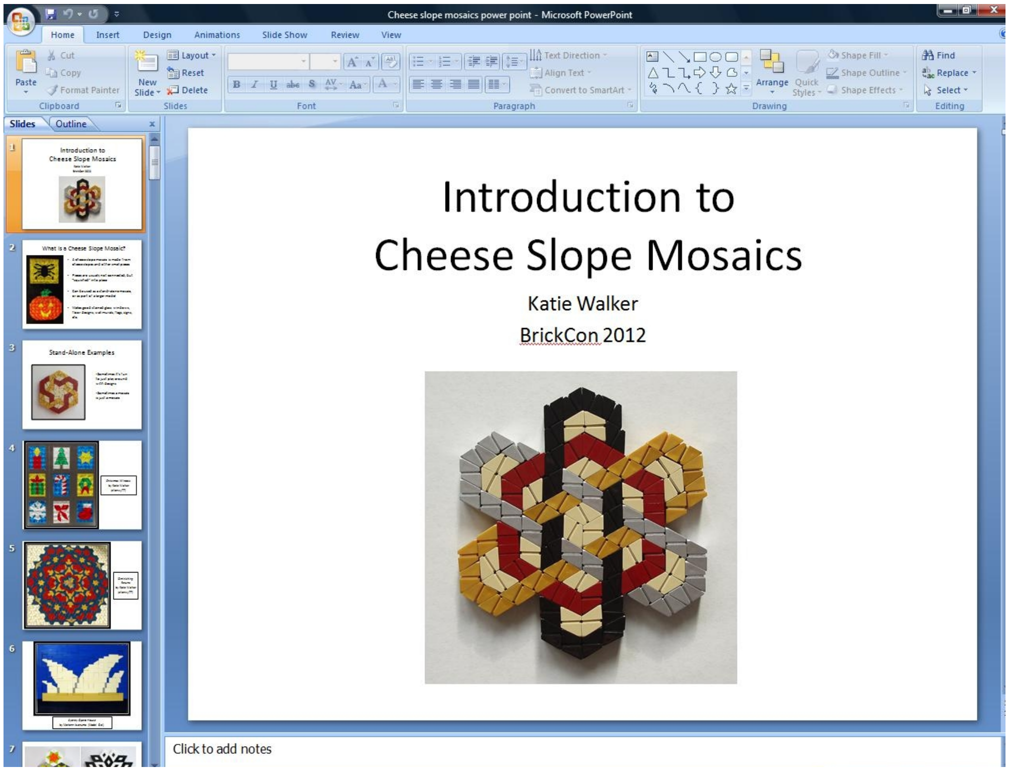
Multimedia is any content that uses a combination of different content forms such as text, audio, images, animations, video and interactive content. Multimedia can be recorded and played, displayed, interacted with or accessed by information content processing devices, such as computerized and electronic devices. Multimedia platforms are the spaces that you can use to make, share, or view this content. This means that multimedia platforms offer an array of communication and education applications to business audiences. Business presentations, blogs, wikis and podcasts are all excellent examples of how multimedia platforms can get the message across.

One of the most common uses of multimedia platforms today is to create and deliver effective business presentations. Although paper handouts, flip-charts, and props are still used, they can fall short in several respects.

Handouts are typically paper-based and have two major shortcomings. First, they tend to distract the audience, who try to read ahead instead of listening to the presenter. Secondly, handouts carry the risk of falling into the wrong hands, either unauthorized personnel or even competitors. Flip-charts are also limited in several ways. First, to make an effective flip-chart graphic, talent and professional tools and materials need to be used. Secondly, they are cumbersome to transport and somewhat dated in their use. Props are also considered to be dated and trite for today's business presentations.

Presentations

Multimedia slides created by applications such as PowerPoint, Keynote, Adobe Presenter, or Prezi can provide the basis for effective presentations. These applications provide professional color, graphic and font capabilities, which help to better express the presenter's ideas. They can integrate video, audio and hyperlinks into the presentation, providing a great vehicle for a successful meeting.



Different people process information in different ways. Multimedia platforms allow for the same content to be presented in different ways. Having a combination of text, images, and sound can help emphasize your message and catch people's attention at multiple points during the presentation. An embedded customer testimonial video can go a long way to reinforcing a message of good service, giving more credibility to the presenter. Special effects, such automated highlighting or underlining of text on a slide, can break up text-heavy slides as long as they are not overused.

Despite the dazzling experience multimedia presentations can provide, success still depends on the presenter knowing the audience and framing ideas that are important to them. You may be familiar with the "Death By PowerPoint" syndrome where the audience is paralyzed with a never-ending stream of slide after slide after slide. We will cover multimedia business presentations in more detail in Module 8: Developing and Delivering Business Presentations.

Blogs

Another multimedia platform to effectively communicate with business audiences is the blog. A blog is really a website with journal-style entries on topics designed to inform and invite comments. Blogs are used in business to communicate with customers and employees. For customers, blogs are a great vehicle for market research, public relations, customer outreach and solicitation of feedback. Here are examples of blogs from Starbucks and Coca-Cola that do an outstanding job of customer relations.

Wikis

A wiki is a web-based platform that usually serves as a knowledge base. Wikis are composed of combined knowledge from an online community of contributors. In a business environment, private intranets are used to keep wikis within the company firewall as they are the repository of sensitive company procedures and processes. Information such as travel expense policies, HR rules and forms, internal contact directory, last quarters financial press release, etc. can easily be accessed from all company locations including remote employee offices.

Podcasts

In addition to presentations, blogs and wikis, podcasts are another multimedia tool used for effective business communication. Podcasts can take advantage of all the techniques we have discussed in this module so far but are primarily video and audio-based. Podcasts can be streamed live or can be recorded for repeated use.

PRACTICE QUESTION

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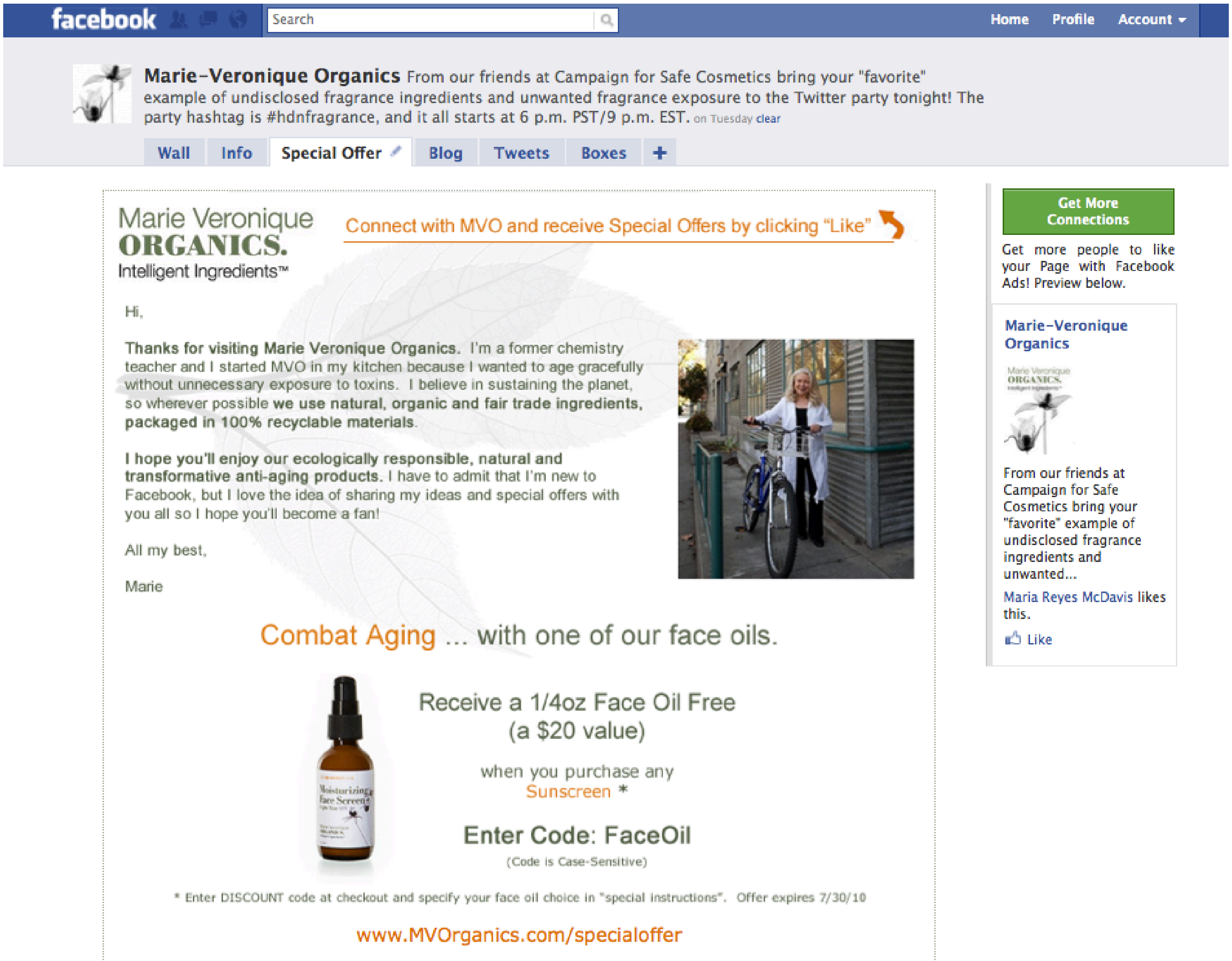
Social Media Networks

The use of social media networks in business communication can be divided into two categories: external and internal.

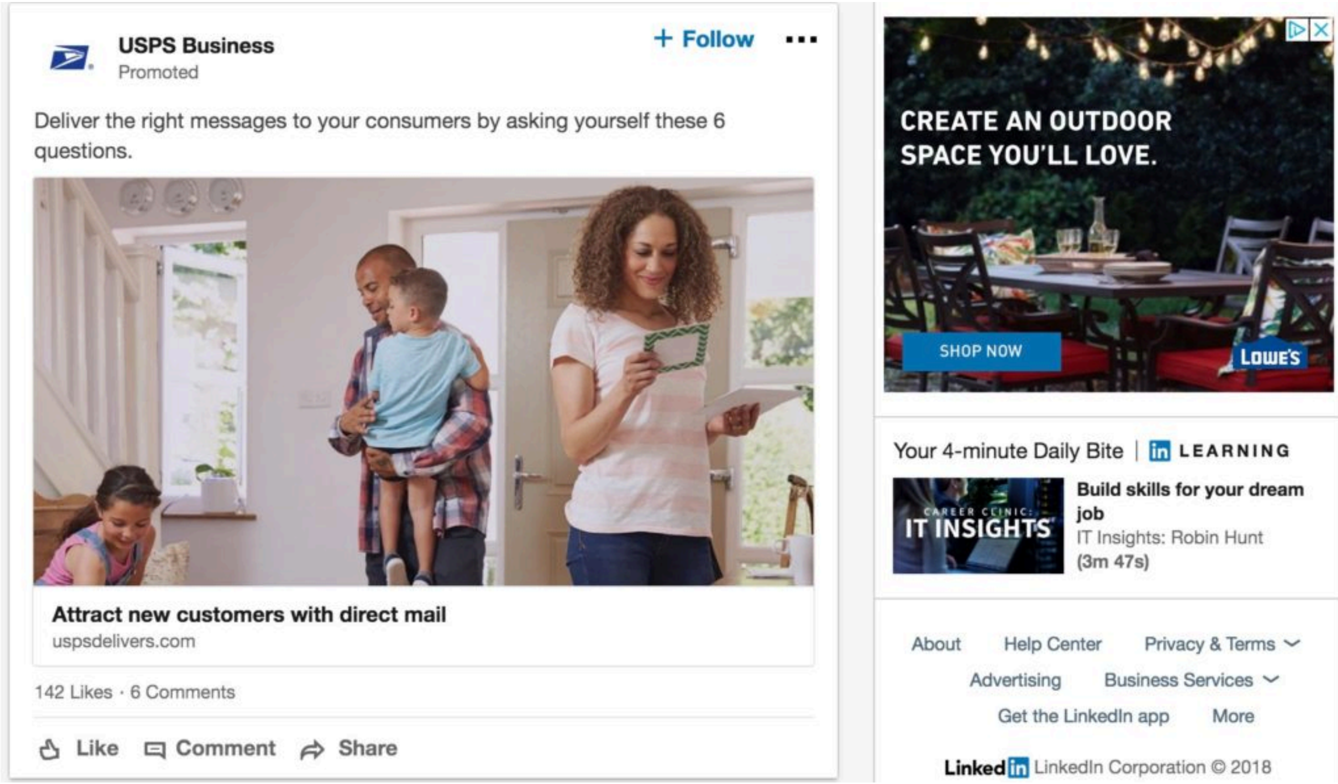
External Use

Companies use established social media platforms like Facebook, Twitter, Pinterest, and LinkedIn to reach out to vast external public online communities. These communities have users numbering in the millions (Facebook in the billions), so it is no surprise that they are naturally attractive to businesses for multiple marketing activities.

Here is an example from Facebook—a page displaying organic fragrance and skincare from Marie Veronique Organics:



Here is an example of social media advertising on Linkedin:



Internal Use

The second category of social media in business communication is internal use. Many large organizations have private internal social media platforms for employees only. Many of these use a model similar to Facebook, but utilize software platforms from companies like Salesforce, Yammer, and Jive. This use of social media is quite powerful and allows large business to easily connect employees across disparate sites, keep employees informed of important information in a format that is readily consumed.

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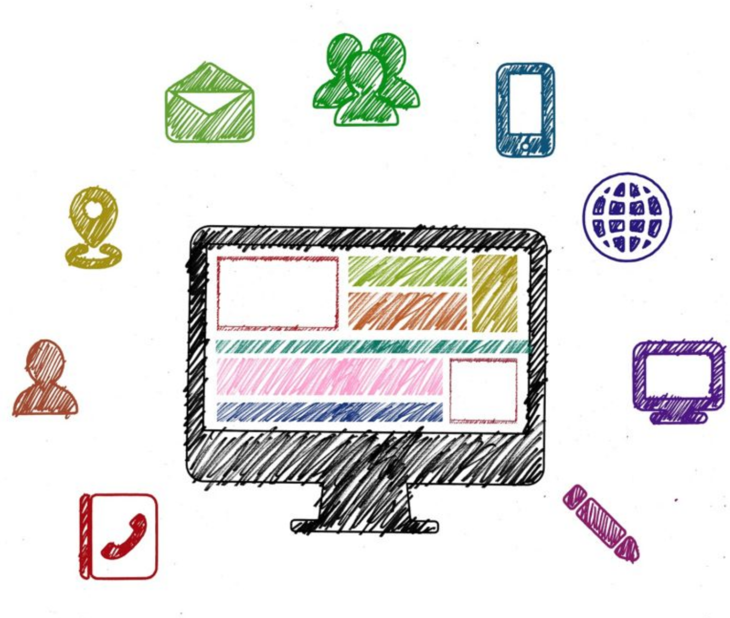
EXTERNAL COMMUNICATION

What you'll learn to do: Discuss appropriate ways to communicate to an audience outside of the company



What are the various types of emails sent outside of company networks? How should employees respond to customer email messages? How should companies handle messages that are critical of the organization? What is the best way to respond to a specific customer request? How would an email sent to a business partner differ from one sent to a customer?

LEARNING OUTCOMES

- Identify various types of external emails
- Describe appropriate and professional responses to customers
- Write a response to a critical message from a customer
- Write a response to a customer's request

Types of External Emails

Some of the most common types of external emails in business communication are requests, direct claims, complaints and adjustments. Business letters could be used for any or all of these categories, but email is usually the preferred method of conveying these messages.

Requests

Request messages should should have direct subject lines: for example, “Available for Conference January 5?” Provide details of the request in the body of the message, “Would you please get back to us on your availability to speak at our conference January 5? We have your talk featured to be given in the large conference room at the beginning of the conference at 9:00 a.m.” Close your message with a call to action and an appreciation, “Your presentation was the hit of the conference last year, and everyone is looking forward to your participation again. Please respond to us by December 9 so that we can finalize the invitations.”

Here is an example of an external request message:

> ABC Software
>
> To: Mike Scott
>
> CC: Western Sales Team
>
> Subject: Exclusive Event: Executive Summit On Business Agility
>
> Dear Mike,
>
> Senior leaders like you know that delivering faster is critical to adapt to rapidly shifting customer expectations, competitive shifts, and regulatory changes. If you’re facing these challenges, then most likely, so are your peers.
>
> We thought you’d be interested in attending ABCs upcoming “Executive Summit on Business Agility” on June 15, where senior executives can engage with peers and co-create fresh ideas to solve their toughest business challenges.
>
> - Have meaningful, face-to-face interactions with other F500 senior leaders.
> - Learn directly from executives who are tackling similar blockers.
> - Participate in facilitated, expert-led discussions on how to architect your whole business system for speed, steering, and opportunity.
>
> Please include this invitation code ES25V on the Request to Attend form. As an additional benefit of participating in the Executive Summit, enjoy a complimentary pass to the ABC-ON!™ business agility conference, June 15–17—in Phoenix, Arizona at the AAA 4-Diamond JW Marriott Phoenix Desert Ridge Resort where we will have Josh Jones, Dan Atware, and Jalissa O’Neill, as our distinguished keynote speakers.
>
> To create a valuable exchange of ideas, this event is limited to 50 attendees. The event is filling up fast, so please respond within the next few days.
>
> Best regards,
>
> Dan Smith
>
> Senior VP/ Sales
>
> ABC Software

Claims

For a claim message, it is also best to state the major point as soon as possible. Use the subject line to express your reason for sending the message. For example, “Return Label for Order #123456.” Then in the body of the message, immediately provide the details or justification for your request, “Please send a return label as soon as possible for my order #123456. The order, which I placed with your company on March 2, was for jeans with a 32′ inseam and I received a 36′ inseam instead.” For the closing, give an appreciation and re-state the desired action, “I will look forward to receiving the return label in the next few business days. Thank you for your quick response.”

Complaints

Complaint messages are similar to request and claim messages. Get to the point right away in the subject line, justify and explain in the body of the message, and end with a clear description of your desired outcome.

October 15, 2017

To: General Manager Best Eastern Hotels

From: Sheila Eastman

Subject: Erroneous Charge on My Stay October 4

Dear Mr. Smith,

Upon receipt of my hotel bill from my stay on October 4, I noticed I had been mistakenly charged for a room service meal. I did not have room service during my brief stay and would expect an immediate credit in the amount of $64.73 to my credit card account.

Thank you for your prompt attention to this matter.

Best regards,

Sheila Eastman

Adjustments

An adjustment message should begin with an immediate reference to the prior correspondence. As with all of the email messages we have discussed in this section, the main point should be stated right away. Also, the body of the message should provide details regarding how the request is being handled. Closing should be a positive statement referring to the good news of the adjustment.

October 16, 2017

To: Sheila Eastmen

From: Brian Smith

Subject: Your Credit for the error on your October 4 bill

Dear Ms. Eastmen,

Thank you for your message of October 15 requesting a credit for a mistaken charge to your bill. After a quick review, you are quite correct about the error in your bill. A credit of $64.73 has been issued to your credit card company and should be reflected in your next statement.

On behalf of Best Eastern Hotels, we sincerely apologize and hope that our prompt response to your request restores your faith in our company.

Sincerely,

Brian Smith

General Manager

Best Eastern Hotels

PRACTICE QUESTION

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Customer Emails

Email communication to customers requires the utmost courtesy and skill, no matter whether the message contains good news, bad news, or is just informational. After all, no business can be successful without customers. Your email message to a customer may be the only direct interaction they have with your company, so ensure that you are thoughtful in crafting it properly.

One way of ensuring a positive customer experience with your email is to personalize it. People like to know they are communicating with another person, not just some large department in a larger company. Wouldn't you rather receive an email from "Susan" instead of "ABC Software Support"?

Second, always be appreciative of ANY communication sent to your company by a customer, as it is an opportunity to improve or deepen your relationship with that customer. Whether the customer is contacting you to provide a suggestion, complain about another department, or register a product defect, we always thank them for the opportunity to do better.

Finally, give some thought to the content of your email and how that could relate to the structure of your message. For example, when your message contains good news or is informational, it is always best to get to the point right away. We do not want to waste our customer's time reading through unnecessary background or other details before we deliver the crux of the message.

Here is an example of a good news message:

> April 2, 2018
>
> Re: A suggestion for your next release
>
> To: John Goodenow
>
> Dear John,
>
> Thank you for taking the time to let us know of your idea. I brought it up at yesterday's project status meeting with the developers, and everyone reacted positively to your suggestion. In fact, we wanted to get more details from you about how you would like to see the feature to work. Would you be available later this week to spend a few minutes on the phone with Josh and Alicia, who own that area of the product architecture, to discuss?
>
> Please let us know when a convenient time for the call would be. Once again, thanks for being a great customer and providing such useful feedback.
>
> Best regards,
>
> Bob
>
> Senior Product Manager
>
> ABC Software

Delivering bad news to a customer is never easy, because we naturally do not want to ever disappoint them. However, there will be times when a business email will need to address information that is going to be taken as bad news. There is some controversy about the best way to do so.

One school of thought believes that bad news should not be delivered right away in an email communication to a customer. It is thought that that type of message should begin with a "buffer"— perhaps the facts that led to the situation, an immediate expression of apology and empathy, or an appreciation of our relationship with the customer. This so-called "indirect" approach to communicating would then call for revealing the bad news in the middle of the message. The closing of this style of email would then end with a positive sentiment about future business, perhaps some sort of discount on the next purchase, etc.

The major problem with this indirect email structure is that it can be perceived by the customer to be insincere, unethical, and a "run around." Many people prefer to get the bad news directly and not feel as if they are being misled or manipulated. Suffice it to say that great care should be exercised before adopting the indirect method of delivering bad news to customers.

Here is an example of responding to a message in an indirect way:

> April 2, 2018
>
> *Bob Josephson

Re: A suggestion for your next release

To: John Goodenow

Dear John,

ABC Software is considered to be one of the most customer-driven software companies in the industry. Tantamount to that reputation is our responsiveness to customer suggestions for product features.

We thank you for your feature suggestion, and we are sorry that we will not be able to consider your suggestion for the next release as we simply do not have the staff to implement such a feature. As you may know, the growth of the software industry has put increasing pressure on the ability of companies to hire software developers.

We hope that you will continue to remain a loyal user of ABC and will not hesitate to send your suggestions to us in the future.

Best regards,

Bob

Senior Product Manager

ABC Software

While some may find this indirect approach more pleasant than an immediate no, as we mentioned, others may feel like this email is insincere and prefer a more direct message. Here is the same response modified to be more direct:

April 2, 2018

*Bob Josephson

Re: A suggestion for your next release

To: John Goodenow

Dear John,

Thank you so much for your new feature suggestion. We are sorry that we will not be able to consider your suggestion for the next release as we simply do not have the staff to implement such a feature. As you may know, the growth of the software industry has put increasing pressure on the ability of companies to hire software developers.

We hope that you will continue to remain a loyal user of ABC and will not hesitate to send your suggestions to us in the future.

Best regards,

Bob

Senior Product Manager

ABC Software

LEARN MORE

For additional tips on writing customer service emails check out this article from Groove customer support software.

PRACTICE QUESTION

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Responding to a Critical Message from a Customer

As stated in the last section, any message from a customer is to be treated as an opportunity to improve the relationship with that customer. When a critical message is received, it is best to follow these guidelines:

1. Contact the customer immediately
2. Describe immediate remedy to the problem
3. Describe why the problem occurred
4. Describe action being taken to correct the problem going forward
5. Offer positive thoughts for the future

Often items two and three will be intertwined in your email: it can be hard to describe how you're addressing the issue without describing what went wrong in the first place.

Here is an example of how a critical customer message can be handled:

September 22, 2018

*Sara Hernandez

Re: Why doesn't your app work on my device?

To: Mark Griffiths

Dear Mark,

Thank you so much for sending in your inquiry. We took a look at the information and screenshots you provided, and it looks like your device may not have its location functionality turned on, which can prevent our app from working correctly. For guidance on turning on your location functionality, please look at the attached guide.

If this doesn't resolve the issue, please let us know, and we can work with you to solve the issue.

Sincerely,

Sara Hernandez

Customer Support Representative

Not all customer issues can be solved in just one email. Additionally, there may be complex issues that require multiple people to solve the problem. In these situations, it is essential to keep the customer aware that someone is looking into the request; however, sometimes things slip through the cracks.

Take a look at this email sent to a customer whose product wasn't working, and then failed to receive any response from customer service:

September 22, 2018

*Rick Donaldson

Re: Why don't I get service from your Customer Service Department?

To: Eddie Bangston

Dear Eddie,

We at Distance Golf are very sorry that our initial efforts to satisfy your request have fallen short. I was forwarded your email today from our Customer Service department, but I am able to inform you today that we have discovered the cause of the problem.

It turns out that the country club you joined is not currently on our list of supported golf courses for our GPS distance device. I apologize that Customer Service did not immediately get back to you with that information; it took longer than anticipated to discover when your country club was scheduled to be added to our support courses.

I am happy to report the good news that your country club is on the list of supported golf courses for the next software update release. You should be able to use our product to lower your scores as soon as the December 1st release. We've also attached a list of courses in a ten-mile radius of your country club that are currently supported on the GPS distance device.

Again, our apologies to you for the tardy response to your inquiry. Hopefully, you will get years of happy golfing from Distance Golf!

Sincerely,

Rick Donaldson

General Manager

Distance Golf

PRACTICE QUESTION

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Write a Response to a Customer's Request

Responding to a customer request via email should follow much the same rules we have described in responding to any and all customer communication. We want to be concise and direct in structure, and courteous and appreciative in tone.

When responding to a customer request, use the subject line to reinforce your main point. Provide your answer to the request right away in the opening of your message. Use the body of the message to provide details, explanation and any additional information needed. Close with a summary and expression of appreciation and goodwill.

July 31, 2018

*Dave Waddell

Re: Your July 25 Inquiry Regarding Additional Education Discount

To: Dan O'Connell

Dear Dan,

Thank you for your message regarding Plato Publishing's discount to academic institutions. Yes, we do offer an additional discount for Higher Education purchases.

Our website has the complete schedule of the sliding scale used to calculate volume discounts off our list price. For academic institutions such as yours, we add an additional 25% discount to the volume discount price. There is also a monthly list of publications that are being offered at special prices that also will receive the additional academic discount.

I have attached a PDF list of our complete offering for your convenience.

We greatly appreciate your ongoing business. Please contact me if you have any further questions or needs.

Sincerely,

Dave Waddell

Customer Service Manager

Plato Publishing

PRACTICE QUESTION

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USING THE RIGHT COMMUNICATION CHANNEL

What you'll learn to do: Determine the appropriate communication channel for a specific type of message

How do I match the electronic communication channel with the audience and the message? Given all of the techniques we have discussed in this module, what is the most effective technique based on the situation available today?

LEARNING OUTCOMES

- Determine the appropriate communication channel for a specific type of message

Advances in technology have opened the door to a myriad of vehicles for communication in business today. In written business communication, the idea and purpose of the message is the most important, closely followed by how it is written, and then by what means is it routed. Harmonizing these three characteristics will determine how effectively the message is received.

Since we have already discussed how we write various digital messages, we will now focus on the third element—what electronic business communication channel should be utilized for a given message. Here are several criteria to keep in mind when determining which communication channel to use:

1. Who is the audience?
2. How important is the message?
3. What is the level of confidentiality?
4. How much interactivity is needed?

5. How much information needs to be conveyed?

We always start our message creation with the audience in mind—for what we say, how we say it, and what communication technique we use. A quarterly corporate performance report is probably not texted by the CFO to all employees of a company. Sending a multimedia slide deck to request time off to your manager is likely overkill. It would would not be appropriate for someone in the HR department to use IM to contact management regarding the résumés of the candidates to be interviewed for the new VP of Marketing job. These are extreme examples, of course, but they all illustrate the same basic point.

PRACTICE QUESTION

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Although the criteria above are listed as separate items, they need to be considered together when choosing appropriate communication channels. For example, if you need to get a quick question fired off to a member of your team on a joint project consider the following: First, the recipient is a teammate and you probably communicate frequently with them. Second, the message is a quick question that needs to arrive right away to keep the project on track. Third, the information is probably not top secret; and fourth, you need them to be able to get back to you ASAP with a response. By cycling through several of our listed criteria, we would arrive at the conclusion that an IM would be the best way to get the job done.

What about the case of a message that needs to be sent to your manager to inform her about a new development on an upcoming large business deal? First, since your audience is your manager, you would want to use proper, formal and complete language. Second, the message is important—it will probably be circulated to higher levels of management and will need to serve as a record of the status of the deal. Third, there may need to be a degree of confidentiality because of the nature of the information being discussed, especially if it is a public company. Finally, the message will probably not require a rich level of interactivity, as it is intended to inform a limited audience. For this example, an email would probably be the best communication channel.

EXAMPLES

Another scenario: Your team is the first to work together with a new distribution partner on an important large client. After you have spent months working out the kinks of an effective process between the teams in both companies, your manager informs you that another group in your company will begin to work with this new partner on another joint customer. You are asked to bring this new group up to speed on how to work with this new partner. Based on our criteria above, would we send the new group an IM, an electronic memo, an email, a report, or utilize a blog or wiki?

Think about the five criteria of considering the best channel to use: The audience, importance of the message, level of confidentiality, level of interactivity needed, and amount of information that needs to be conveyed. Write your thoughts below:

Now that you have taken some time to consider the scenario and write down your thoughts let's examine the facts. The audience is an internal group, the information is important and confidential, no interactivity is really required, and there is probably a decent amount of documentation to be recorded. This communication would be best presented as a wiki residing in an internal intranet for broad access, but only by company personnel.

PUTTING IT TOGETHER: WRITTEN COMMUNICATION

In this module, we have discussed the evolution of business communication from traditional, paper-based media to today's electronic methods. We have reviewed traditional vehicles and explored where they can be the most effectively utilized. Advances in technology have provided a myriad of new ways to communicate both privately and professionally, such as through email, SMS text, IM, LISTSERVs, collaborative team platforms, and of course social media.

Despite all of the new tools in the toolbox, the elements of effective communication remain largely the same. We have explored the concepts of direct versus indirect message structure and the differences between various categories of messages. We have seen internal and external message styles—and even touched on internal versus external social media. We have reviewed multiple examples of simple, casual communication content versus more formal structure. And with each category of content, we have explored how to determine the best electronic means to get the job done.

Most importantly, we have studied how to write effective business messages depending on their purpose and context. We have highlighted the features and structure of well-written professional electronic communication. It is important to remember that each of us are continually measured on based on our written communication skills. This is true whether our audience happens to be colleagues, managers, customers, or business partners. Regardless of the platform, we must strive for the highest standards in our professional communication.

WATCH IT

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MODULE 4: RESEARCH

WHY IT MATTERS: RESEARCH

Why learn traditional and online research methods?

Business communication, done well, requires thoughtful planning and carefully crafted media. Research is a key component of building good communication, and research, while perhaps hard to wrap one's mind around, is like any other project.

Whether you present your communications over email, in a nice glossy, or even a video presentation, you will likely have to research topics in order to support your ideas. Doing research is important for good business communication.

In this module, we will discuss all manner of conducting research. Our guiding principles are from social science inquiry, which uses a fairly specific and largely agreed upon format.

As you consider the role of research in business communication, we invite you to ask yourself the following introspective questions:

1. How important is it to use reliable and factual sources and data when communicating in business?
2. Who is your audience? Do they require formal citation or other forms of attribution and credit?
3. How do you evaluate a source? How do you know if something is any good or not?

In this module, we will look at the above questions, and many more related topics around the idea of research. Before we begin, consider the messages in the following video from Microsoft Research:

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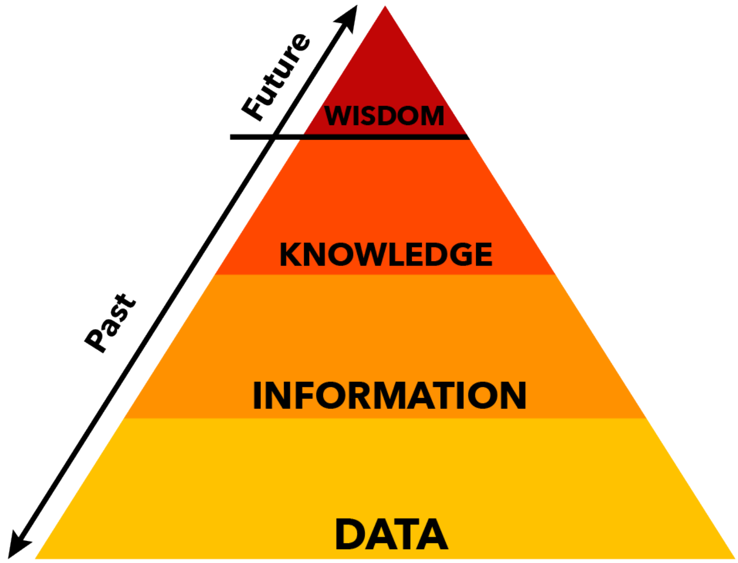
What did you learn from the video? Broadly speaking, research is about finding out new things! In this sense, research can be fun and exciting. In this module, we hope you'll be inspired to use research methods to learn new things, and communicate these new things effectively to people in your organization!

CONDUCTING RESEARCH

What you'll learn to do: Discuss the importance of data and identify its role in business

Andrew McAfee and Erik Brynjolfsson of MIT, discussed in a 2011 *Wall Street Journal* article, that "the companies that had the data they needed and used it to make decisions (instead of relying more on intuition and expertise) had the highest productivity and profitability." (Note: McAfee, Andrew and Erik Brynjolfsson. "What Makes a Company Good at IT?" *Wall Street Journal*, April 25, 2011. Web. 12 June 2018.)

All organizations strive to make well-informed decisions. We may consider the day-to-day work and existence of organizational life as a cycle of gathering, interpreting and disseminating useful data. From the Knowledge Management (KM) field, we know that data is the most fundamental or "raw material" form of knowledge. We may consider that data "matures" as it is consumed, analyzed and worked with inside an organization. Information is data that has been analyzed for its usefulness, knowledge is information integrated into an organization's decision-making, and wisdom is consistent application of data, information and knowledge. Your goal, regardless of your specific position or seniority in an organization, is to identify the key data, information and knowledge most germane to your role. Then work to become as proficient as possible in its dissemination and use.



In this section, we will explore the importance of data and its role in business. You may consider your role in data gathering and manipulation to be aiding your organization's use of the data to improve its quality. Your goal is to move data to wisdom in order to help your organization improve.

LEARNING OUTCOMES

- Discuss the impact of research in business reports
- Discuss the steps in the research process
- Identify common types of internal and external data used for business reports
- Explain the role of primary research and the most common forms that are used
- Explain secondary research and how it is used to provide support to the report

Using Data for Impact

A business report is any formal or informal document or set of documents used to analyze a business situation and help decision-makers aid the business. Reports use data in various forms to make their claims and/or inform their audience. There are two types of business reports; both use all sorts of data:

1. **Analytical Reports:** Those used to help make a decision (e.g., whether to hire more people, expand a product line, etc.)
2. **Informational Reports:** Those used to inform people throughout the organization about something of importance.

All reports should be true, factual and helpful. An analytical report should help decision-makers with a very specific type of decision or action. Usually a decision-maker will ask him or herself, "Do I have everything I need to make an informed and quality decision?" Any reports for decisions or actions should be designed around answering this question. Additionally analytical reports should make a recommended solution, based on the data provided in the report.

Informational reports are usually shorter and simply disseminate information about organizational happenings. People are generally familiar with memos, newsletters or other similar items. Informational reports are similar to these items in that they relay something of importance to the organization. We might consider an informational report to be slightly higher in its concision and quality than a memo or newsletter, particularly based on the type of research used to illustrate the information at hand.

Business reports should be:

1. true, factual
2. concise, brief
3. built to help others make decisions
4. free from unnecessary or extra information
5. simple; they should address one question (i.e., well-scoped)

Often employees in a given organization who are tasked to assemble business reports will create something too broad or too detailed. This tends to happen with more junior or less-experienced individuals intent on demonstrating their skills; ironically, in business communication overall, and certainly in report writing, less is more. The writer of any report is encouraged to think like an executive:

1. What do I need to know right away?
2. How quickly do I need to make a decision?

Alfred P. Sloan, the business giant who built General Motors, famously said that his number one requirement for success was to simply "Get the Facts."

Interestingly, perfect information is not always available or even needed. Speed, especially around decision-making, is also key. Jeff Bezos, CEO of Amazon said the following about making big decisions: (Note: Salisbury, Ian. "This Is Jeff Bezos' Best Advice About Making Big Decisions." *Time Money*. April 13, 2017. Web.12 June 2018.)

> Most decisions should probably be made with somewhere around 70 percent of the information you wish you had. If you wait for 90 percent, in most cases, you're probably being slow. Plus, either way, you need to be good at quickly recognizing and correcting bad decisions. If you're good at course correcting, being wrong may be less costly than you think, whereas being slow is going to be expensive for sure.

We might extrapolate from Bezos's quote that he likely means the 70 percent of information you have, however, must be true. So the issue here may not be volume of information but rather having enough good/true information to make a reasonable move forward (i.e., a decision).

As mentioned above, at the heart of good research is the proper use and interpretation of data.

Data are all the rage these days. "Big Data," "Data Analytics," "Data Science" and other varieties of data use and exploitation are very useful for making key decisions. It can be hard to determine what data is useful. If we define data as, "plain facts, usually numbers," as Elon University does here, that means we need first to understand the type of data we need, then we have to understand its source(s), and lastly, we have to make sense of the data for our purposes. This requires a research mindset, and it requires us to view report writing as essentially a research project. Through this module, we will address these issues through the lens of research.

PRACTICE QUESTIONS

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Investing Time in the Research Process

This page discusses a general research process, one that is useful in a variety of organizations to support report writing. We borrow the process largely from social science, where the focus is answering a question or gaining insight about human affairs. The general research process is usually as follows:

1. Determine a problem and define a question to answer.
2. Find general background about your problem/question.
3. Develop a research strategy to address any data, information or knowledge gaps. These gaps may be referred to as "sub-questions."
4. Conduct research.
5. Collect, read, evaluate and write what you have learned.
6. Cite the information you have found so that others will be able to follow your research trail.

THE HUMAN FUND

Consider Martha's case as a study or illustration of the above process. Martha is a junior analyst with The Human Fund, a business in Chicago specializing in selling local handicraft goods made by homeless families. The Human Fund supplies raw materials such as yarn, cloth, leather or other items, training homeless participants in their use and then providing a safe place to make clothing, bags, and other items. The organization has experienced fairly consistent growth in their three years of operation and has received excellent local press for its help to the city.

Martha's boss directs her to study whether their work is benefiting families in the downtown area because the company's leadership is considering whether to put more resources into that neighborhood. Martha considers her assignment and does the following:

1. She determines her research question: "Is The Human Fund's work helping homeless families in downtown Chicago?" Martha also considers that the business report's central goal is not necessarily answering ONLY whether their organization is benefiting downtown Chicago already, but also whether The Human Fund should do more in downtown Chicago. She decides to proceed with her research question but tells herself to write up the report later in a way that will help the executives make their decision about whether to expand operations downtown.
2. She sets aside about 10–20 hours for general online reading/fact-finding, primarily from major newspapers and social services websites. During her general background reading, she collects various facts, figures and other data. Most of this data is quantifiable data, or data that has numbers associated with it. For example, she learns that various charities and the Chicago city government estimate that around 2,000 people are homeless downtown. There is some mention of The Human Fund in downtown-oriented press, but there's nothing that shows their specific impact. She identifies various gaps in her data and determines she will need to do further research outside the office.
3. Her largest gap in data is hearing from the downtown homeless themselves. She could not find sources that discussed the downtown homeless experience or had any quotes or other qualitative (non-numeric) data. She decides to visit with several families downtown over the course of a week. She plans to talk to as many families as she can. To frame her interaction, she develops three sub-questions:
    a. Do you know about The Human Fund and its mission?
    b. Have you sold goods through The Human Fund?
        i. If yes, has the The Human Fund helped you?
        ii. Are you still working with us (The Human Fund)?
    c. Would you like to sell goods through the Human Fund?

    Martha's technique is a structured interview or survey. She has structured questions that will yield a fairly straightforward and closed (yes/no) type answer. While interviewing, she can make a note of how many people she talks to, how many answer a certain way, and based on other data she found in her general reading—particularly the total number of estimated homeless in downtown Chicago—she can gain an understanding of The Human Fund's current impact, and possible expansion.
4. Martha visits with several homeless families downtown, and determines the following:

a. 25 percent of her respondents (74 families asked over a week) know about the Human Fund.
b. Of the 19 families that have heard of the Human Fund, 10 have made and sold goods with The Human Fund.
    i. Of the 10 families that have made and sold goods through the Human Fund, 9 said they benefited from the help.
    ii. Of the 9 that said they benefited from the help, all 9 families plan to continue the interaction.
c. Of the 55 families she polled who had not heard of The Human Fund, 25, or 45 percent, expressed an interest in learning more.

5. Martha begins writing up her report. In the report, she clearly outlines her research question, the background reading, the gaps in data she found in the background reading, the field research and sub-questions, and the data gathered from the fieldwork.
6. Martha is careful to cite all of her work. For her background reading, she hyperlinks to various newspapers or other sources, and for her fieldwork, she gives general data on whom she talked to (e.g., “family of four, sleeping on the streets off of Lake Shore Drive, dad’s name is George).

The above process is one possible way to conduct research. It reflects the general approach to social science inquiry, which seeks to answer a specific (as specific as possible) question about a human circumstance. In Martha’s case, she will now need to develop a report that quickly and concisely details what she found. Most importantly, Martha needs to consider what type of informed recommendation she should make to her boss.

PRACTICE QUESTIONS

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Types of Data Sources

Figure 1 shows frequency data—the amount of something over a given period of time.

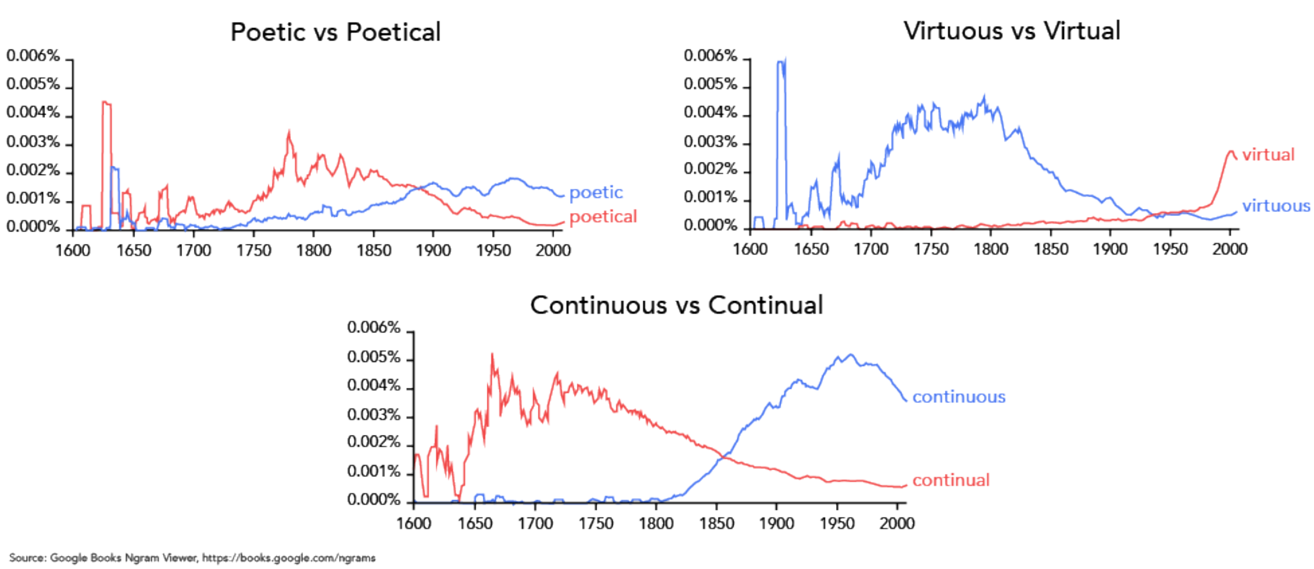

Figure 1. Comparison of word usage from 1600 to 2018

Various types of data are very useful for business reports, and in business reports, you will quickly come across things like revenue (money earned in a given period, usually a year), turnover (people who left the organization in a given period), and many others.

There are a variety of data available when one is constructing a business report. We may categorize data in the following manner:

- Internal
  - Employee headcount
  - Employee demographics (e.g., sex, ethnicity, marital status)
  - Financials (e.g., revenue, profit, cost of goods sold, margin, operating ratio)
- External
  - Number of vendors used
  - Number of clients in a company's book of business
  - Size of the industry (e.g. number of companies, total capital)

Internal and external business or organizational data come in two main categories: qualitative and quantitative.

- Qualitative data are data that are generally non-numeric and require context, time, or variance to have meaning or utility.
  - Examples: taste, energy, sentiments, emotions
- Quantitative data are data that are numeric and therefore largely easier to understand.
  - Example: temperature, dimensions (e.g., length), prices, headcount, stock on hand

Both types of data are useful for business report writing. Usually a report will feature as much "hard" quantitative data as possible, typically in the form of earnings or revenue, headcount, and other numerical data available. Most organizations keep a variety of internal quantitative data. Qualitative data, such as stories, case studies, or narratives about processes or events, are also very useful, and provide context. We may consider that a good report will have both types of data, and a good report writer will use both types of data to build a picture of information for their readers.

PRACTICE QUESTION

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10-K

A common report required of all publicly traded companies is the 10-K. This is an annual report that all public companies in the US have to file with the US Securities and Exchange Commision (SEC). For example, you can take a look at Apple's 10-K.

Figure 2 shows Apple's 10-K's table of contents, and illustrates common types of data used. Note how much of it is quantitative based (Item 6 for example,) however other data, such as leadership biographies (Item 10), also provides context.

Primary Research

Primary research is usually defined as research you collect yourself. This type of research is done to fill in gaps found during secondary research review. That is, one does not conduct primary research if you can address your research question with already existing secondary sources.

Think back to Martha's case we discussed earlier in this module; her interviews of homeless people in downtown Chicago are primary research. She is doing these interviews only because her existing secondary sources lack

Apple Inc.

Form 10-K

For the Fiscal Year Ended September 30, 2017

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Figure 2. Apple's 10-K

something she feels she needs now to properly answer her research question (about the current experience of homeless families in downtown Chicago). Primary research is used to supplement gaps in more accessible secondary research (covered in greater detail in the next sub-module).

Purdue University's Online Writing Lab describes the following as typical primary research:

- Interviews: Interviews are conversations, typically in small groups, where one party asks questions of another. Interviews are usually conducted in-person, between two people (the person asking questions and the person answering them); however, these can also take place over the phone, and may involve multiple parties.
- Surveys: Surveys are typically written documents that are sent out to individuals to fill out. Surveys are more rigid than interviews, as an interviewer can change their planned questions based on the subject's responses. Surveys, however are pre-written and can only respond in limited anticipated ways.
- Observations: Observations are just what they sound like: the researcher watches something and records what they see. It is important to avoid influencing whatever you're watching. However, if it's impossible to not influence your subject, make sure to include the fact that your presence may have influenced your observations.
- Analysis: In analysis, gathered data is examined and organized so those who are less familiar with technical details can be guided through the data. Analysis can also help uncover patterns and trends in data.

Secondary Research

Secondary research is gathering information from other people's primary research. Common forms are books, journals, newspaper articles, media reports, and other polished accounts of data. Most will use secondary sources for their business reports; the value-added is to gather, curate, and present the material in a new, updated and helpful manner. It is far less costly, more efficient, and requires less time to gather data from already built sources. In business, where everything has a cost, we may argue that we hope we can answer our research needs through secondary sources alone.

Primary research is expensive and time consuming. That said, primary and secondary data should interact, and as discussed, we gather primary data when we find gaps in what is already available from secondary sources.

One example of a "good" secondary source is this McKinsey and Company discussion on data and analytics in business. Later in the module, you'll learn how to assess a source. Consider coming back to the McKinsey piece here and running the source through these tests and frameworks.

PRACTICE QUESTIONS

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INTERNAL DATA

What you'll learn to do: Process information from internal sources

Barron's defines internal data as: (Note: All Business, "Internal data." Barrons Dictionary. Web. 12 June 2018.)

> Information, facts and data available from within a company's information systems. Internal data is normally not accessible by outside parties without the company's express permission.

While this definition seems straightforward, the complexity of gathering and analyzing these types of data can be more complicated than one might think. Processing data from internal sources requires patience, diligence and care. There are two primary concerns:

1. **The act of gathering information about your own organization is not without political and ethical considerations.** When a person from one part of the organization seeks data about another–or about the enterprise as a whole–it can have implications for the well-being and security of people's circumstances. Think of a salesperson who is having their volume studied by an HR analyst or an accountant being

questioned about how quickly their division processes invoices—inquiry into organizational phenomena can be a charged event.

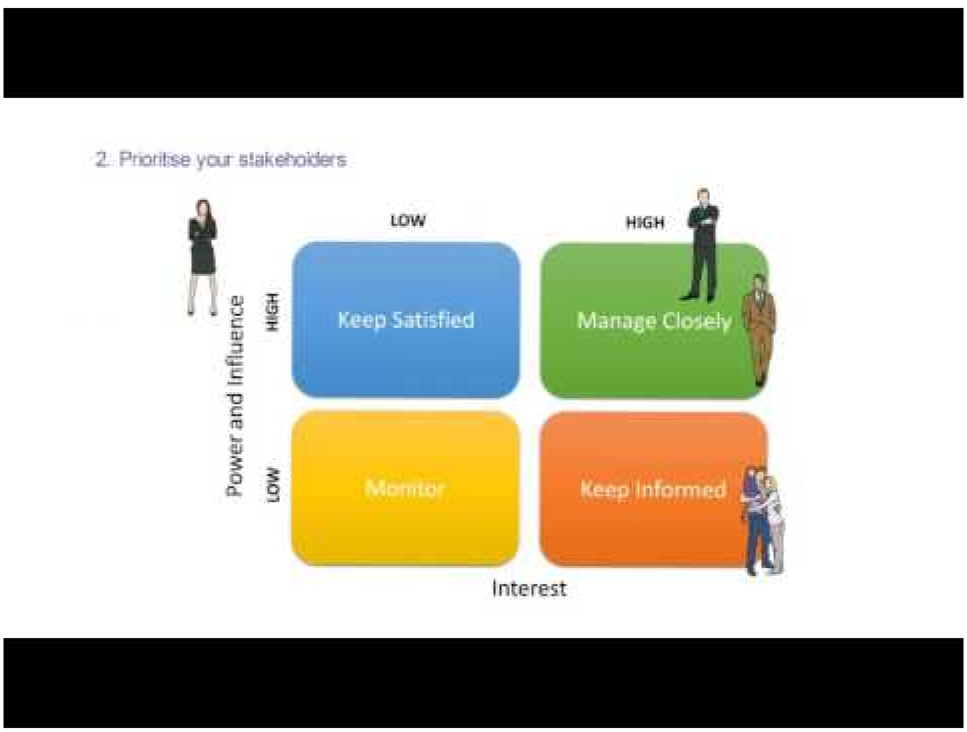
2. **Data can be dynamic and often hard to find.** Some data are relatively straightforward and can be captured in time, or the gathering and publishing of the data is mandated by an outside element. For example, studying Apple from their 10-K is straightforward; however, learning more about their culture from people who currently work there is far more complicated, as illustrated by this Business Insider UK article here. The reasons an organization would be so close-hold about their culture is usually justified by the competitive landscape in which it operates.

THINK ABOUT IT

How would you address gathering data on your organization if you worked in a competitive and closely-guarded industry?

For our purposes here, the right approach to processing your data is to ask yourself early in your study, “is there any part of this project that could be problematic for any stakeholders involved?”

So, what is a stakeholder? A stakeholder is someone who has a particular interest in the organization; people who work in the organization are clear stakeholders as are customers, shareholders, suppliers and vendors. In short, conducting a (brief, at minimum) Stakeholder Analysis before your research is wise. While these types of analysis can become their own in-depth reports, your goal here is to address political, turf, and strategic sensitivities with regard to the gathering of your data; your stakeholder analysis does not need to be perfect or exhaustive, but consider it an important part of processing your data.



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LEARNING OUTCOMES

- Identify types of primary sources and internal data
- Discuss methods for collecting and analyzing internal data
- Create workbooks and format data in Microsoft Excel
- Create workbooks and format data in Google Sheets

Primary Sources

Ithaca College Library defines primary sources as: (Note: Ithaca College Library. "Primary and Secondary Sources." Web. https://library.ithaca.edu/sp/subjects/primary. 18 June 2018.)

> [Direct] or first hand evidence about an event, object, [or person, and could include] historical and legal documents, eyewitness accounts, results of experiments, statistical data, pieces of creative writing, audio and video recordings, speeches, and art objects. Interviews, surveys, fieldwork, and Internet communications via email, blogs, listservs, and newsgroups are also primary sources.

PRACTICE QUESTION

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Internal Data

Internal data are data about your organization derived from internal primary sources. A report by HR about turnover and hiring or financials from Accounting or Finance are common examples. Note how an article in a business magazine about your organization's talent management would be a secondary source, even if it referenced internal data–originally a primary source. Internal data are usually not available outside the organization unless the organization is mandated to produce such reports, for example publicly-traded companies must file a variety of reports with the U.S. Securities and Exchange Commission (SEC). Depending on the size of your organization, its own public filings may be a great source of material for your business reports.

Let's take a look at Apple's 10-K, which is a report that publicly traded companies must make annually about their organizations. Apple's annual 10-K reports can be found online.

While Apple's data are published publicly for large investor oriented firms (i.e., "publicly traded"), similar data would be interesting and meaningful for other companies in any business environment. We might argue that the most fundamental data are the financials, but other data, such as those around employee hiring practices, leadership bios, and other more qualitative information would still prove beneficial. In this, we can argue that quantitative and qualitative data are both desirable; both are needed to gain the best picture of the reality of a given firm's situation.

Collecting Internal Data

Gathering data on your own organization is a much more complicated phenomenon than we might suspect. Depending on your project or business report, the politics of the event may be quite substantial. Internal data can come from a variety of sources and departments—from sales reports, financial documents, human resources information, or elsewhere.

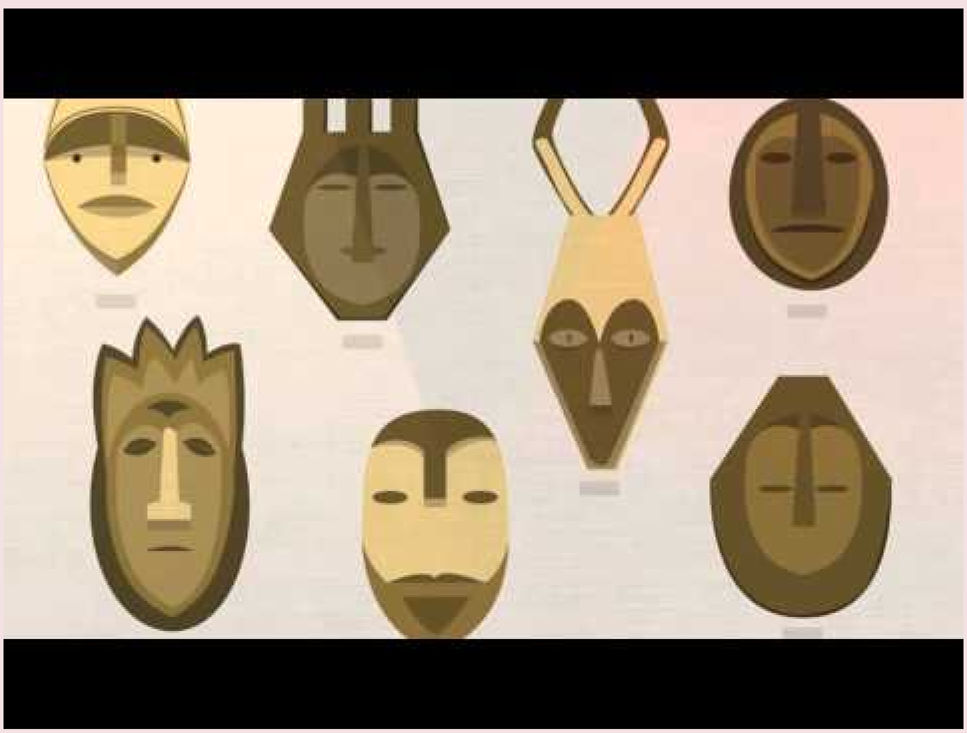
If we return to Martha's case, we remember that her project involves studying The Human Fund's impact on people who are homeless in downtown Chicago. Her background reading would certainly involve looking at any available data on-hand in her own organization. Depending on where she sits, and for whom she works, this data may be readily available, or using it might necessitate some sort of cross-divisional—or at least team—privilege and access. Hopefully she can get her hands on internal information such as the number of participants in the Human Fund, find information about how long individuals participate in the program, or get numbers on the cost of the program to the company, etc.

Research in the Social Sciences

Access is a key concept in social science research. Anthropologists, who often immerse themselves with sub-cultures to observe their lives, probably understand access issues better than most other researchers. If they do not have good access to a group, their ability to conduct their study is compromised. Anthropologists studying the homeless population in Chicago might live among them for a time. Since this is impractical for Martha, she decides to do research more like a sociologist, who tend to use surveys and have less need for direct, prolonged access. Surveys can be difficult to use, however, as they may be completed incorrectly, incompletely, or not at all. When you are participating in "How did we do?" surveys after a customer service phone call or other service event, you are participating in sociological research.

WATCH IT

Check out the following two videos that discuss anthropological and sociological data gathering:



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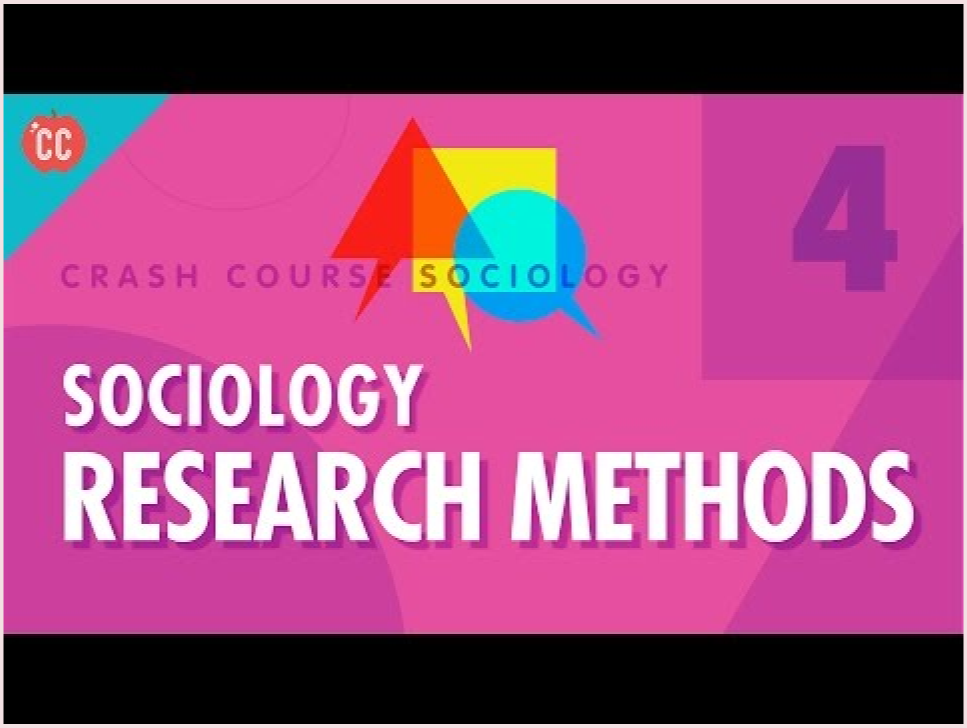
PRACTICE QUESTION



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Note the difference in attitude and goals. While this explanation is a bit simplified, the anthropologist is interested in observing and understanding culture; the sociologist surveys and tests ideas through the use of less personal, but more structured, tools. For our purposes, we may consider how both types of data collection, and both types of attitudes towards data, are useful for business report writing. The goal is getting as much insight into a problem as possible. Depending on your time available, using multiple methods is wise.

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Analyzing Data

Your analysis of a given data set, whether internal or external, is based off of the data gathered. Anthropology tends to view the following as types of data:

- the types of interactions, often called “transactions” that the population engages in
- topics and themes of the transactions
- occurrence/recurrence of the transactions
- tensions between what the group represents as “truth” versus observations the researcher or analyst perceives differently

Anthropologists attempt to make connections and meaning by linking these data to stories and accounts of a given culture or experience. In an interview with CBS News, Dr. Genevieve Bell, an anthropologist, discusses her interest in people and how studying them is, “about spending time with them.” (Note: CBS News. "Intel's cultural anthropologist talks life and technology."16 May 2013.Web. https://youtu.be/ntnyl2V0U9g. 18 June 2018.) While these data can appear “squishy” at times, or too reliant on the researcher’s interpretation, this type of study is very useful for most business circumstances. Provided the business report writer or researcher is aware of their bias(es), and has thought about the ethics of their research (i.e., stakeholder analysis), the type of insights derived can be quite helpful.

Sociological data sets can be similar, but the analysis will be more quantitative and broken down into categories and variables for statistical analysis. Surveys are the most common tool to gain sociological data. You'd naturally be familiar with many of them, for example, customer-satisfaction surveys, expressing your opinion around a particular product. Usually you're asked to express the opinion along a Likert scale: something like "7 means you're extremely satisfied, 1 means you're extremely dissatisfied." Depending on how elaborate you would like your analysis to be, working with statistical data sets can become quite complex. There are also issues around quantifying human behavior and opinion. Clearly one person's 7 is likely to be different from another's, even if they are similar enough conceptually. For our purposes here, we recommend you emphasize simplicity in your business data analysis. Professional sociologists, trained in skills such as multivariate analysis, can help when required, but generally this type of analysis is unnecessary for day to day decision-making and information dissemination.

If you decide to analyze data sets using statistical methods, manipulating the data through a third party platform like Qualtrics or Survey Monkey can be helpful. Develop simple surveys, and use very simple Likert scales to help quantify your data. Note that surveys present qualitative data in a quantified form; take care when representing these types of data as accurate and representative of human sentiment or behavior.

PRACTICE QUESTIONS

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Working in Microsoft Excel

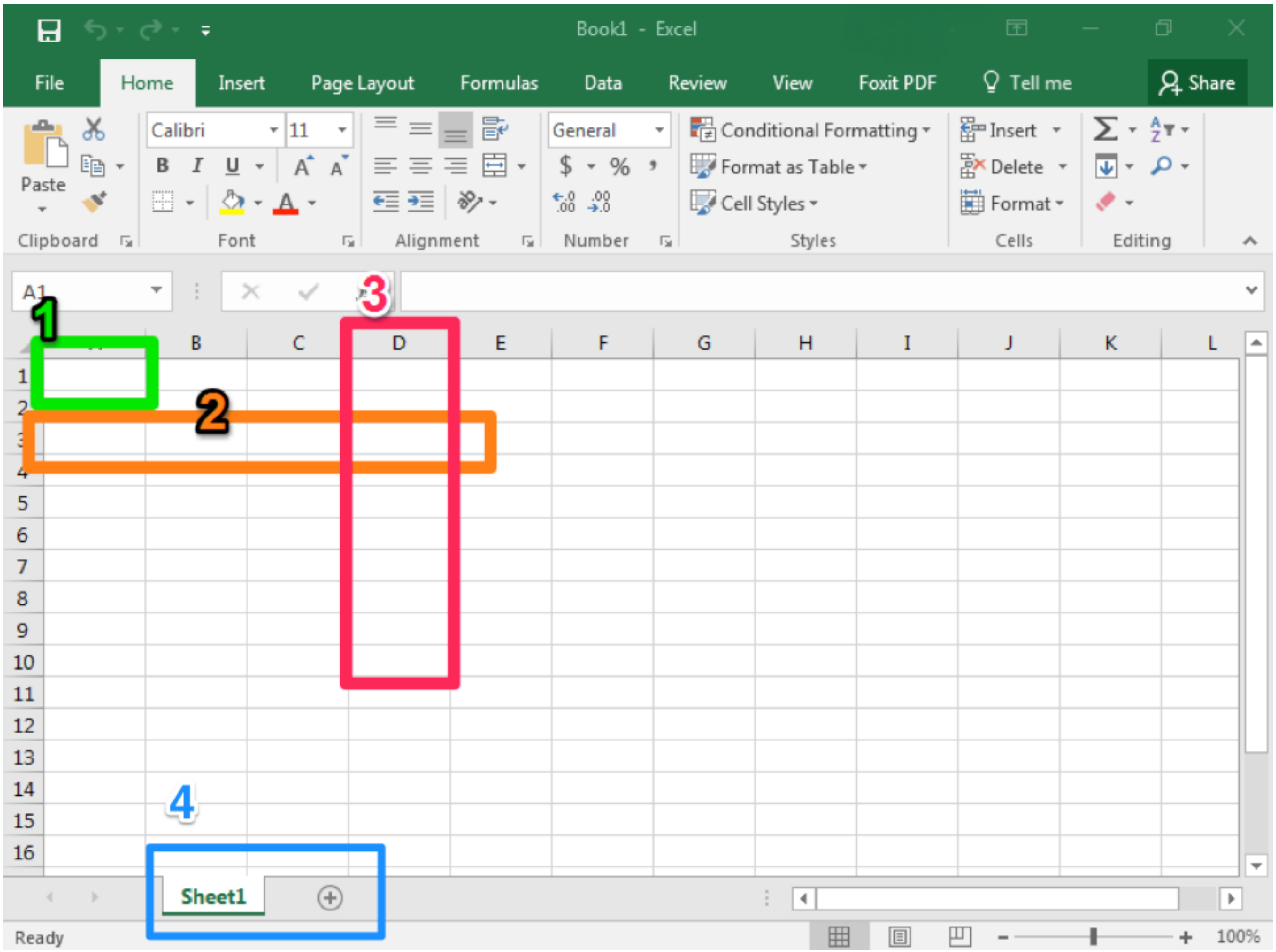
Imagine that you have a lot of business data. Perhaps you have names and addresses for a mailing list. Maybe you have inventory data or quarterly sales values. All this information could be kept in a Word document, but Microsoft Office actually has an extremely useful program for organizing, storing, and even manipulating data: Microsoft Excel.

Learning to use Microsoft Excel is one of the most helpful and versatile workplace skills you can acquire, and creating a worksheet in a workbook is the first step. Many of the skills you learned for Microsoft Word can also be applied to Microsoft Excel, such as basic text formatting and file extensions. The file extension for a Microsoft Excel workbook is **.xlsx**, although pre-2003 versions of Excel might use **.xls**.

In this page, we'll focus on the manipulation of data, rather than the appearance of the worksheet. Additionally, while this page only provides one method of completing each task, there can be multiple ways to accomplish a single goal. For more in-depth instruction, check out this online course covering the basics of Microsoft Excel.

Using Excel

Before using a workbook, it is helpful to know a few key terms.

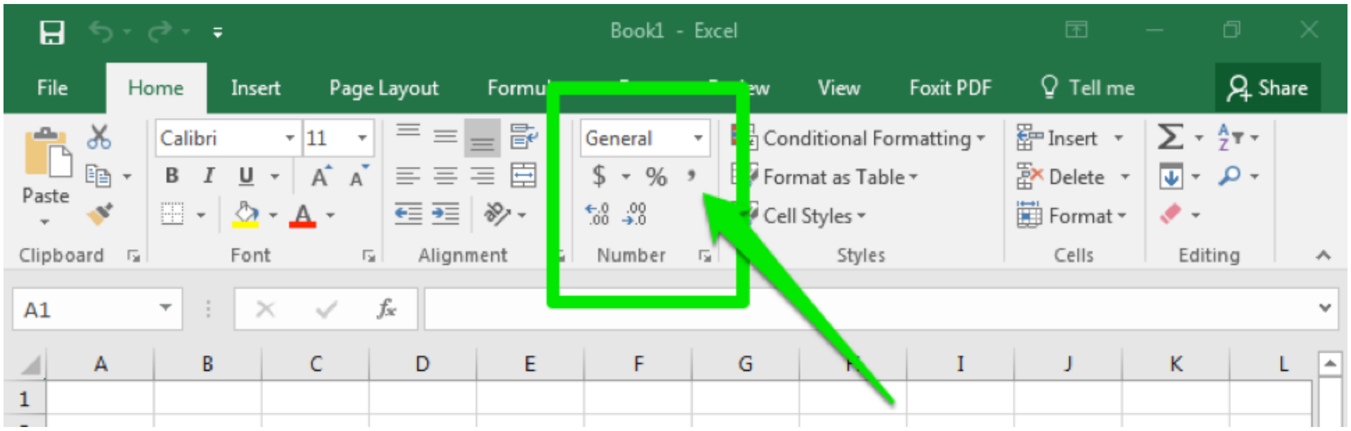


1. **Cell.** This is the area where you will enter data.
2. **Row.** Rows are cells aligned horizontally.
3. **Column.** Columns are cells aligned vertically.
4. **Worksheet.** A worksheet is a single page within a workbook. Like the tabs in an internet browser, the tabs in an Excel workbook show different pages, or worksheets. A workbook may have many worksheets included in it. In this screenshot, the workbook only has one worksheet and one tab, which is labeled Sheet1. The selected tab shows the selected worksheet. Clicking the + button will add another worksheet. When you save a workbook in Excel, all of the worksheets in that workbook are saved.

Comma Styles

At times, you may also wish to use a specific comma style with numbers entered into an Excel worksheet. For example, you may wish “1234” to display as typed or with a comma like “1,234.”

Comma styles are easy to change in Excel using a quick select option in the Number group in the ribbon. Simply to click on the Comma Style button in the Number group.



When clicking the comma style button, the comma style default is to display numbers with a comma in the thousands place and include two decimal places (Ex: “1200” becomes “1,200.00). This will also change the visible cell styles in the Style” area of the ribbon so you can easily select different options for comma and display format.

Listed below are the three most common options for comma and display format.

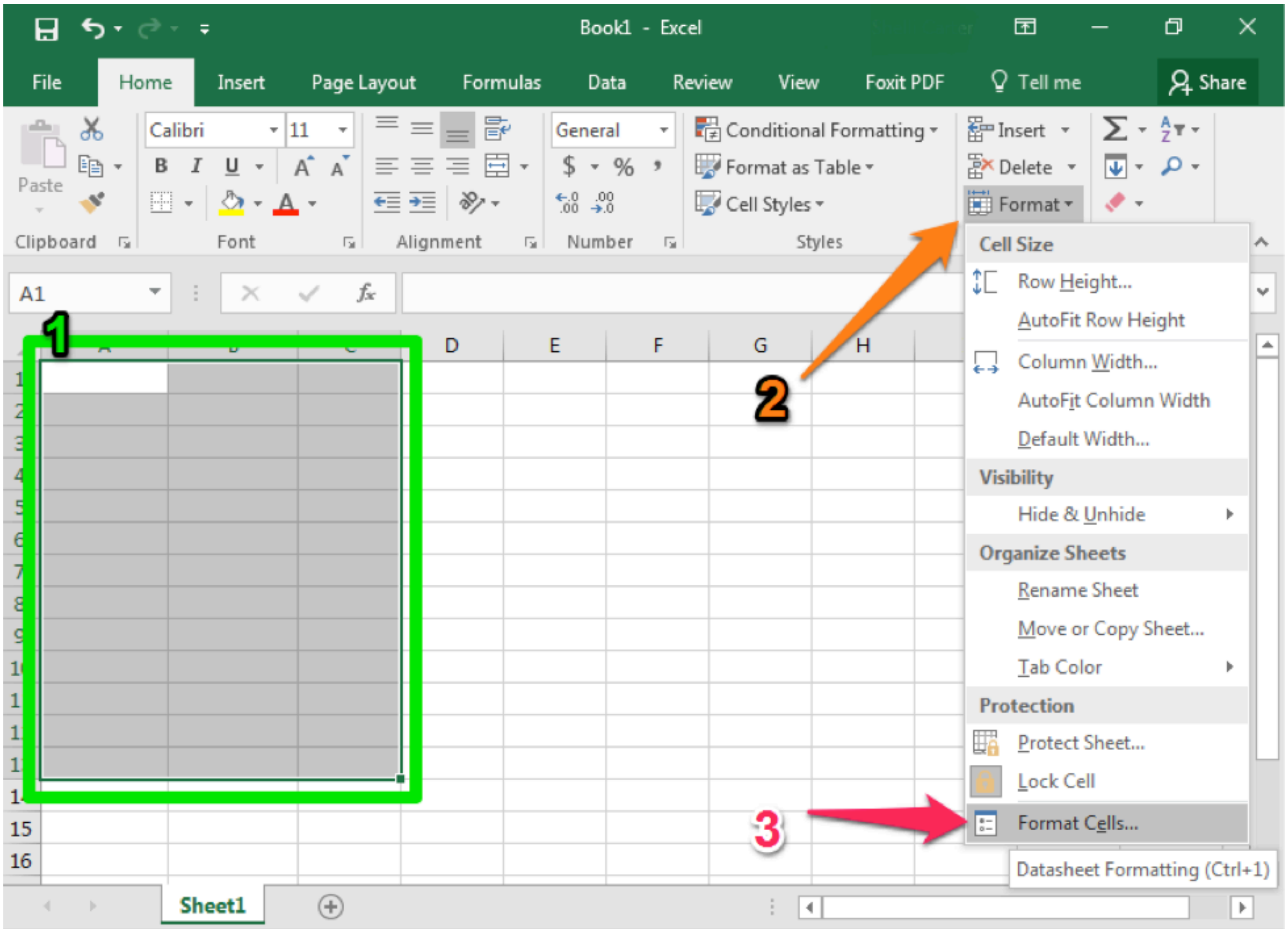
1. Comma: Comma with two decimal points (e.g., 1,234.00)
2. Comma [0]: Comma with no decimal points (e.g., 1,234)
3. Currency: Comma with two decimal points and a dollar sign (e.g., $1,234.00)

Cell Format

As mentioned previously, Excel will default to certain styles when you create a new worksheet. In particular, this includes the way that numbers are displayed and whether or not commas are automatically included. In this section, we will take a look at changing these defaults.

When you type numbers into an Excel workbook, it will often default to a specific format. For example, if you type “12/15/17,” Excel will convert this to read “12/15/2017,” assuming you were entering month, day, and abbreviated year. Similarly, “3/4” will display at “4-Mar,” the fourth day of March. However, it is possible that you may have been entering fractions, so “3/4” was meant to indicate three-quarters instead.

If this is the case, you will need to format your cells to properly display the information you are entering. When possible, consider formatting your cells before you enter the data. Otherwise, Excel may convert some of the entries and you will need to re-enter that information.

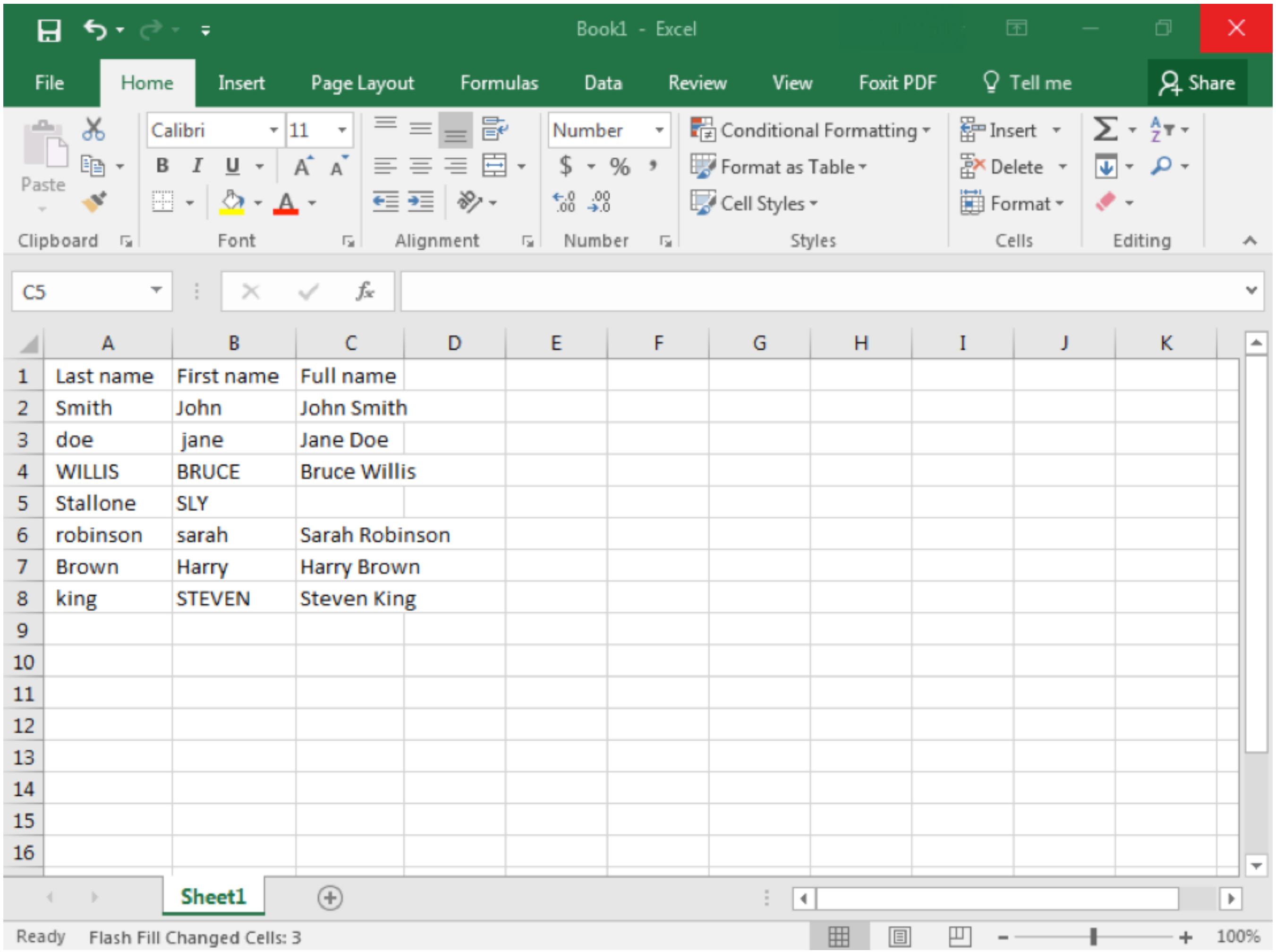


1. Begin by highlighting the cells you plan to use.
2. Select the Format dropdown from the Cells group of the ribbon.
3. Select the Format cells option at the bottom of the dropdown menu.

Flash Fill

Like many modern software programs, Excel is designed to recognize certain patterns. For example, perhaps you are creating a table that lists the last and first names of attendees at a company training session. After all the names have been entered into two separate columns, you realize you would like a single column to correctly display the full name. An easy way to achieve this without having to manually retype the entire list is to use Flash Fill.

1. Create a new column for the combined information you wish to display.
2. In the first cell, type the name as you wish it to display. In our screenshots, this would be “John Smith.”
3. Begin typing the next piece of data in the next cell. Excel should automatically suggest a Flash Fill option.
4. If the Flash Fill suggestion matches how you would like the information displayed, simply hit the Enter key and the rest of your column should fill in automatically.



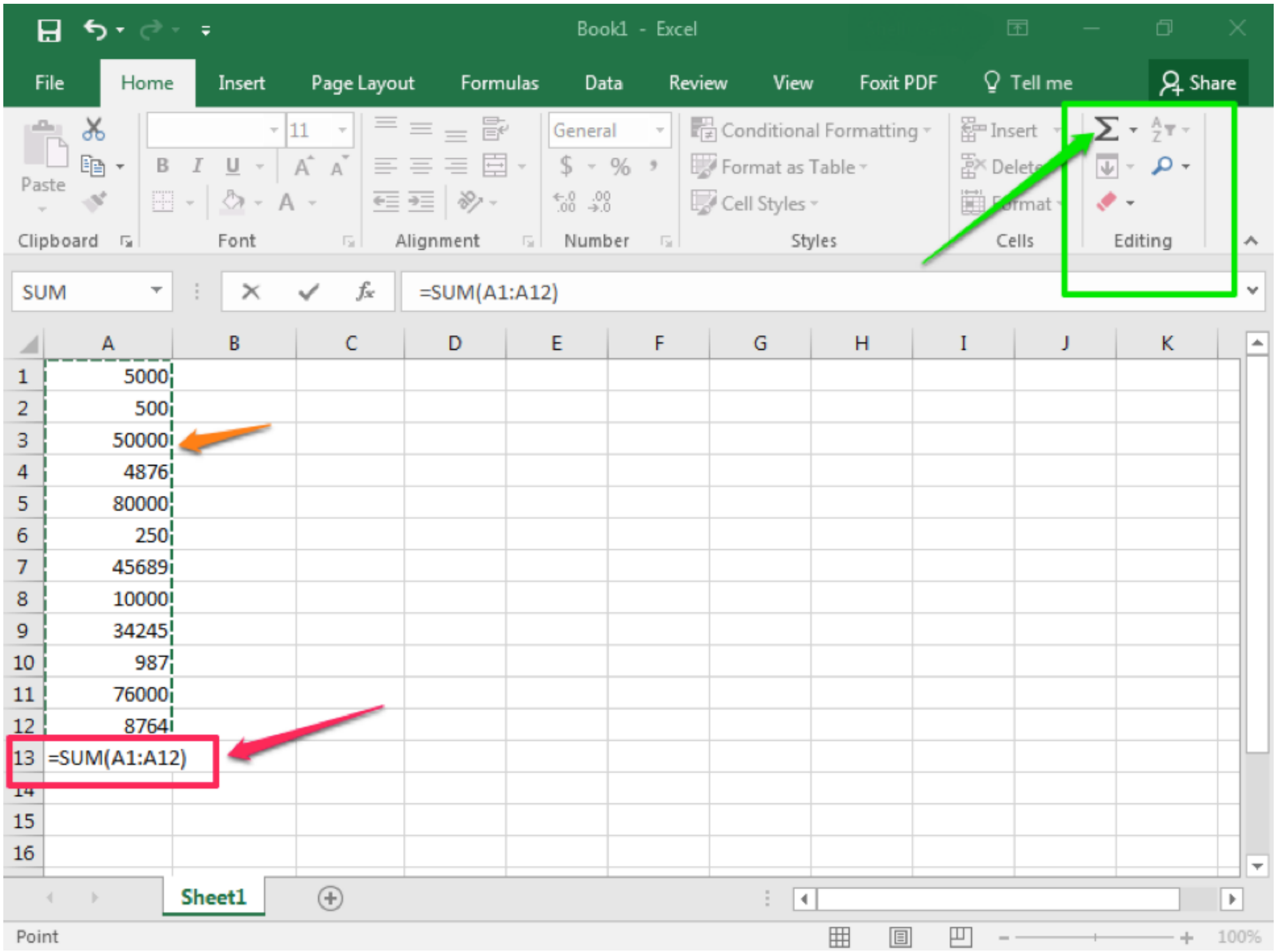
Flash Fill is especially helpful if your data is initially in different forms but you want the final information to display in the same fashion. For example, in our attendee list, some of the names were capitalized, in all caps, or had no capitalization. Sometimes you may need to manually update more than one option but Excel will detect your pattern.

Flash Fill should automatically be turned on in Excel but if it is not, you can turn it on using the File > Options > Advanced menus. You can also turn Flash Fill on or off using the shortcut Ctrl+E. Be aware that the Mac version of Excel does not have Flash Fill.

SUM Data

One of the main uses for Excel is to organize and manipulate numerical data. Often you may wish to add up all the numbers in a column or row. Excel has formulas and commands to automatically add your data, and the easiest way to use this feature is the AutoSum button.

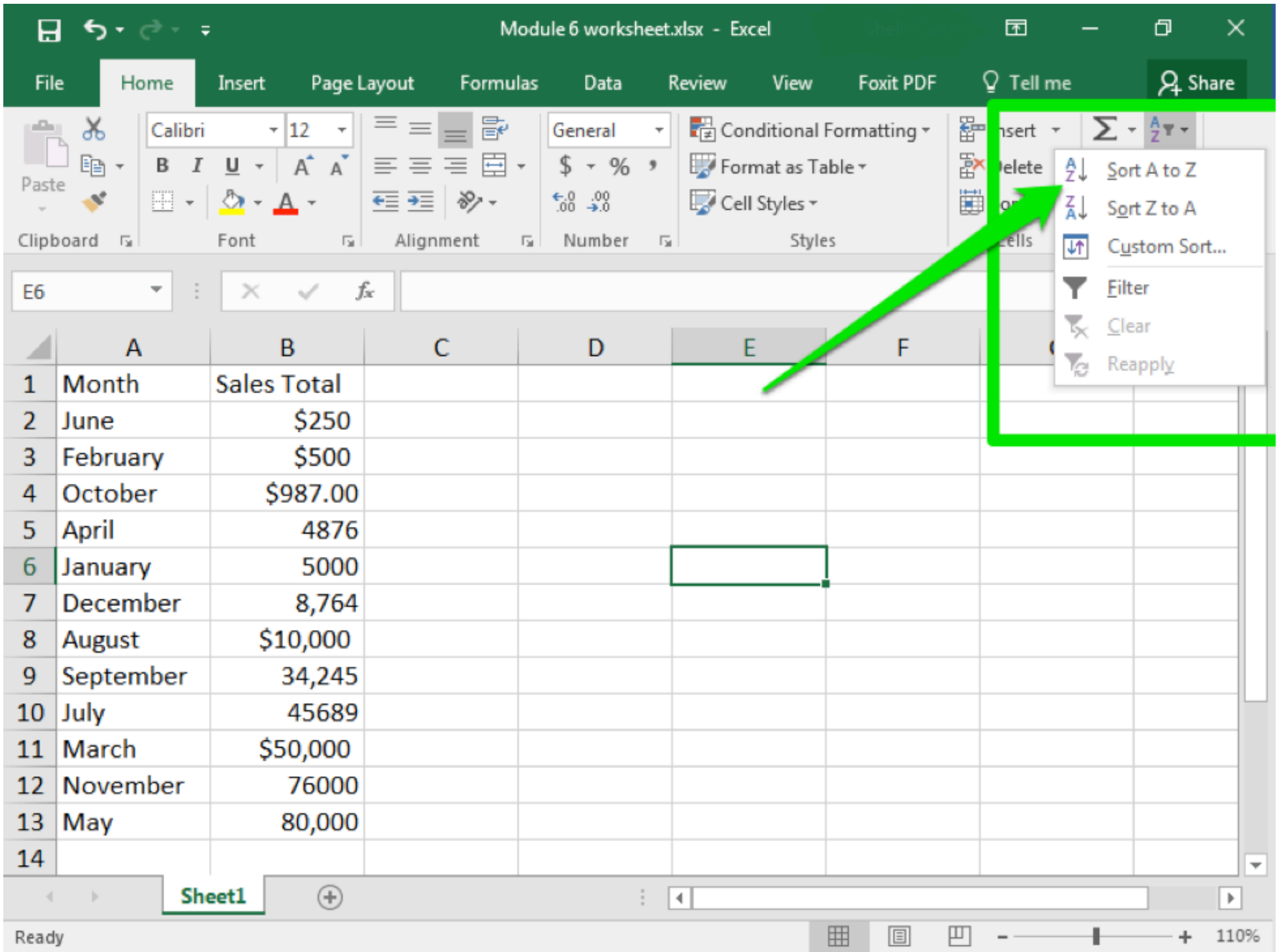
1. Once your numbers are organized in either a row or column, click on the cell where you would like the total sum to display. In the screenshot below this was A13.
2. Click on the AutoSum button from the Editing group of the ribbon.
3. Excel will highlight the cells that it is adding up and will apply the SUM formula.
4. Hit Enter to accept the highlighted cells and see the total value of your data.



Note that it is possible to SUM several columns (or rows) at once. Select all the cells you wish to display a SUM and click AutoSum. Excel will individually add up the columns.

Sorting Data

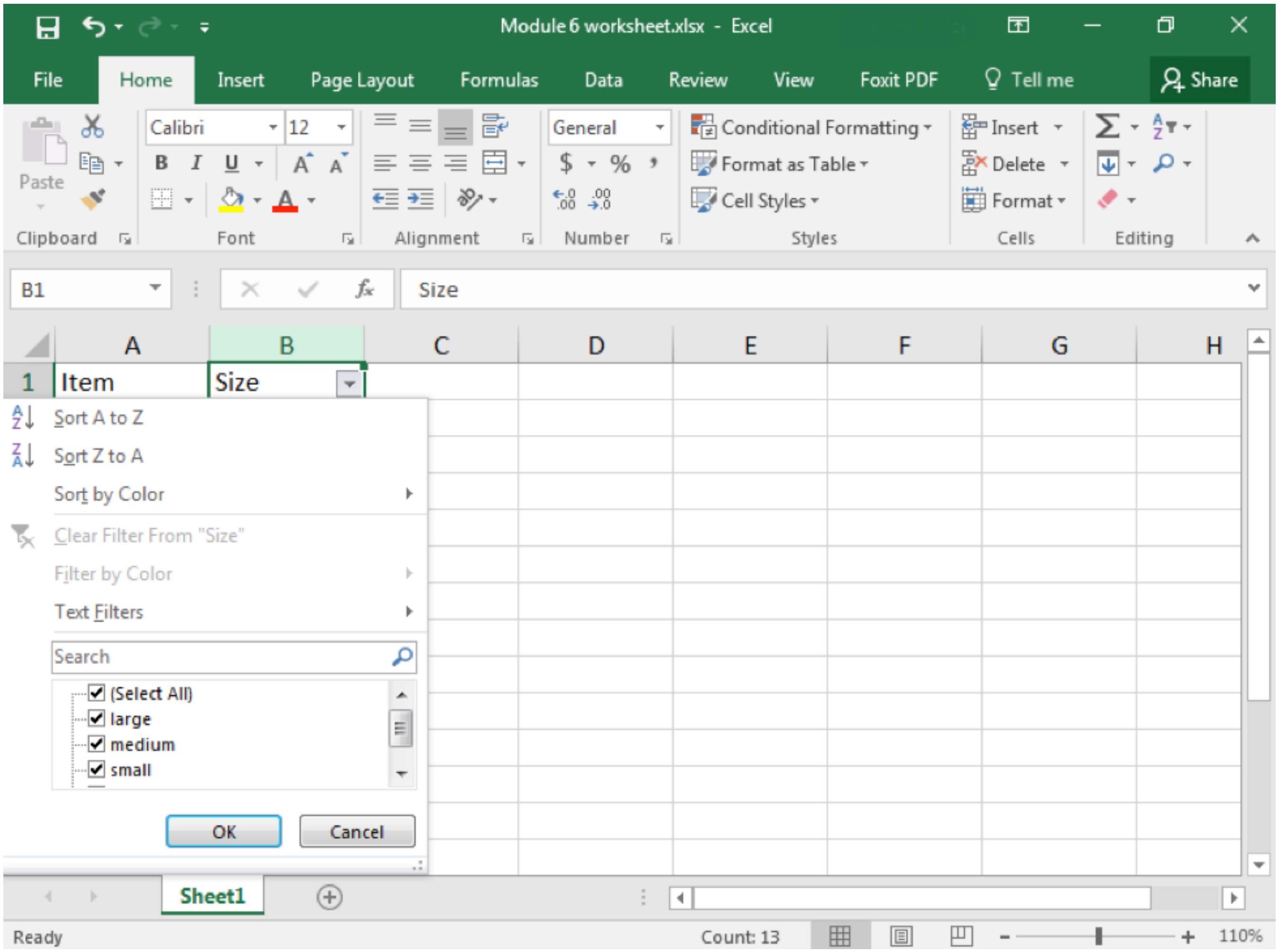
1. Select the column or row you wish to sort.
2. From the Sort & Filter button in the Editing group in the ribbon, click the Sort button.
3. From the menu, choose how you would like to sort the data. For example, A to Z or Z to A. Note that A to Z is equivalent to Smallest to Largest and Z to A is equivalent to Largest to Smallest.



Filtering Data

After entering data in Excel, it is also possible to filter, or hide some parts of the data, based on user-indicated categories. When using the Filter option, no data is lost; it is just hidden from view.

1. Select the column or row you wish to sort.
2. From the Sort & Filter button in the Editing group in the ribbon, click the Filter button.
3. When the Filter menu appears, you can choose which categories of data to hide and deselect the appropriate buttons. For example, you can deselect the button next to large and you will no longer see the large cells in your table.



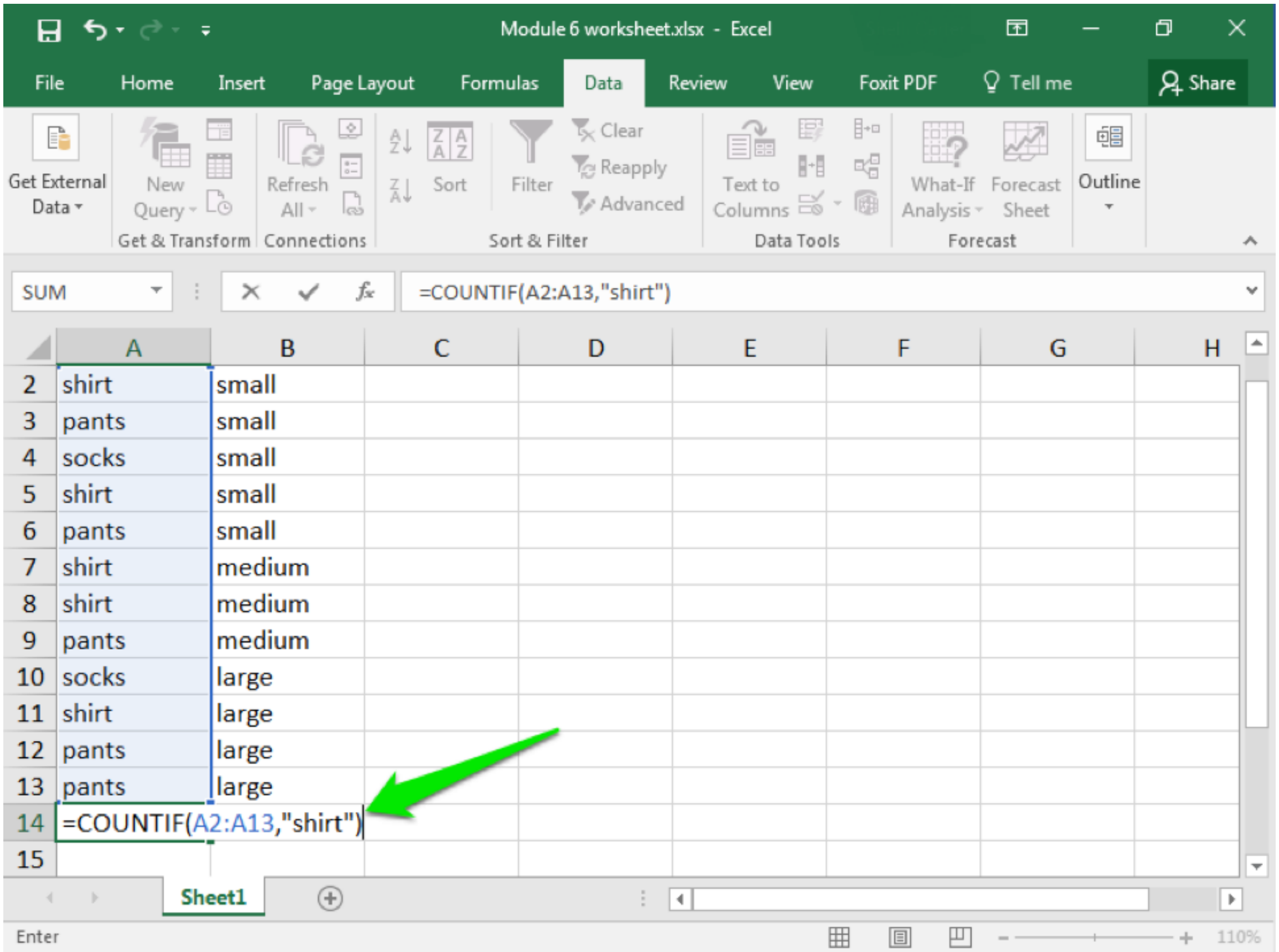
Functions

Excel can perform a variety of really nice data analysis features for you. We've already touched upon how you can filter data. But you can also look for other connections, or screen large numbers of cells to determine how often something occurs.

COUNTIF

COUNTIF is a way for you to ask Excel to count how many times a certain piece of information appears in your worksheet. For example, perhaps you want to know how often "shirt" appear in an inventory list. All you need to do is ask Excel to count the number of cells that contain the word "shirt."

1. Determine which cells you want Excel to look at. In our example, we will look at A2 though A13.
2. Click on the cell you wish your count to be displayed in.
3. Type the formula for a count
   =COUNTIF(A2:A13, "shirt")



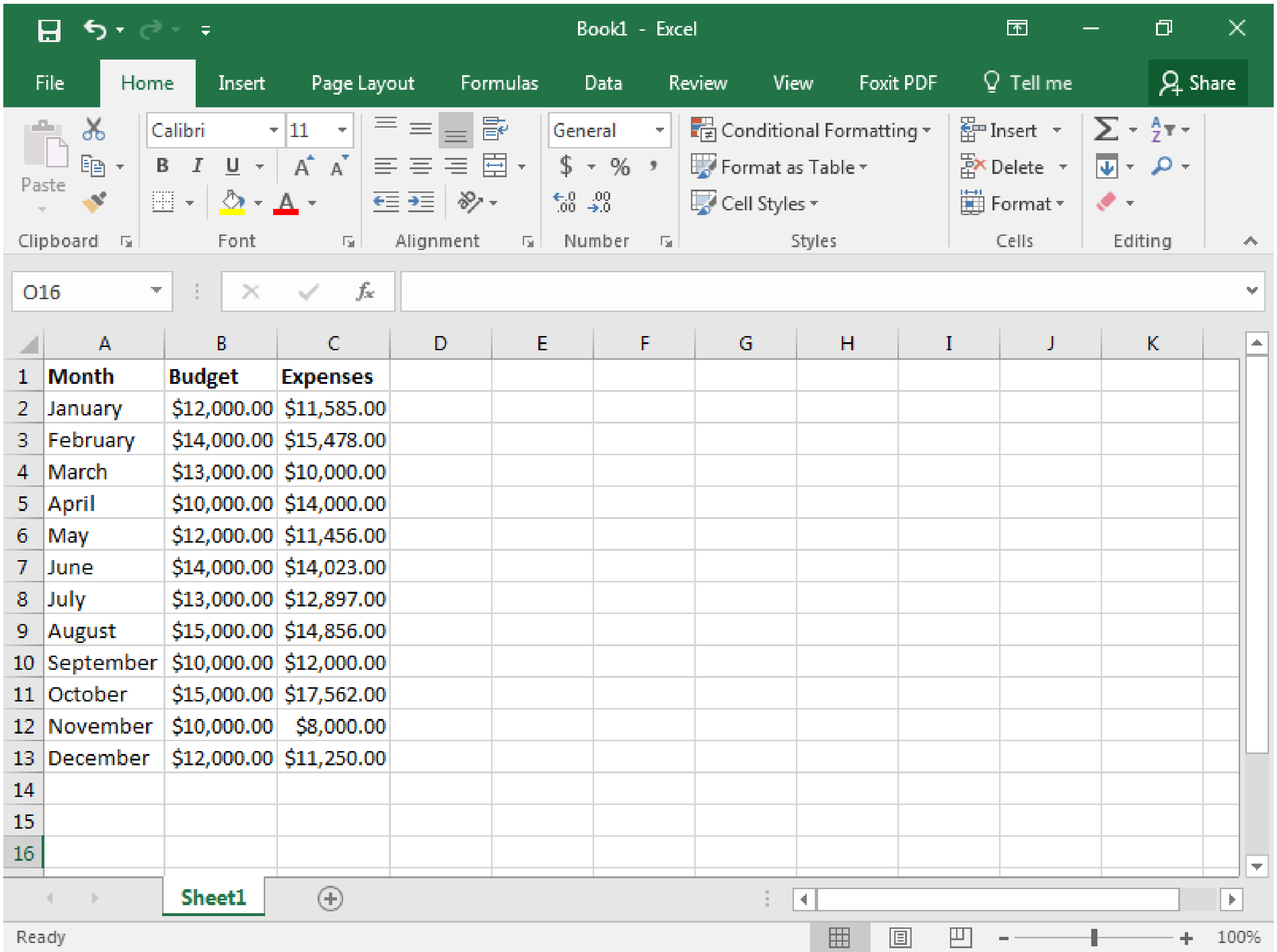
Here you are telling Excel which cells to examine—A2 through A13—and what to look for: “shirt.” Note that your text must match exactly what is typed in the cells, and if you are looking for a specific word it needs to be enclosed in quotation marks (so “shirt” instead of shirt).

4. Hit enter and your results will appear.

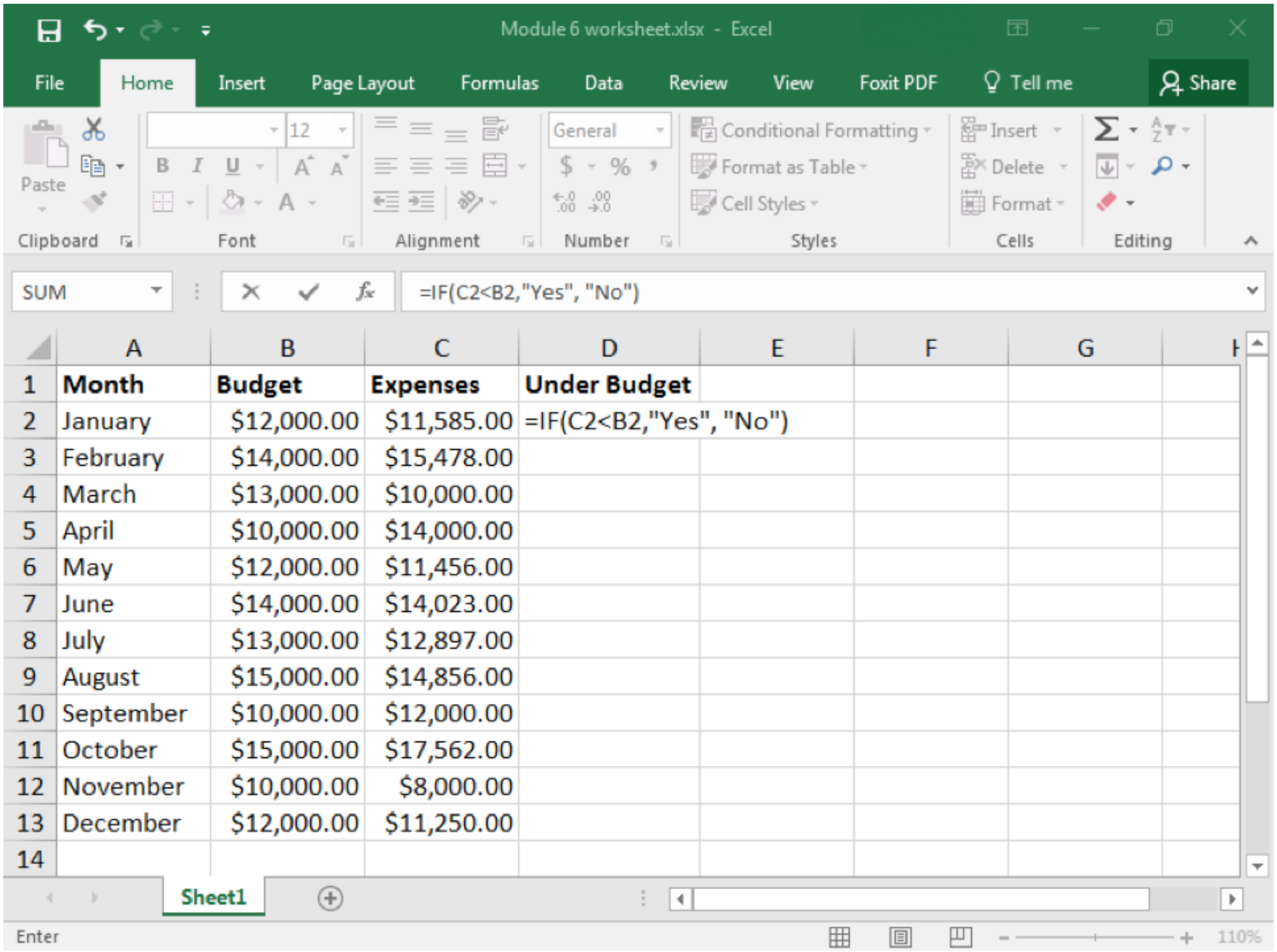
IF

Another commonly used function in Excel is the “IF” function. In this case, you are asking Excel to look for something and then tell you if that something occurred. For example, perhaps you want to compare whether your monthly expenses were under your monthly budget. That is the scenario we will look at in our example.

In this case, let us just ask for a simple “yes” or “no” answer. Looking at the screenshot below, you can see how the worksheet has all the data at hand. We are looking for whether the information in the C column is less than the information in the B column. We would like the D column to display the answer (yes or no).

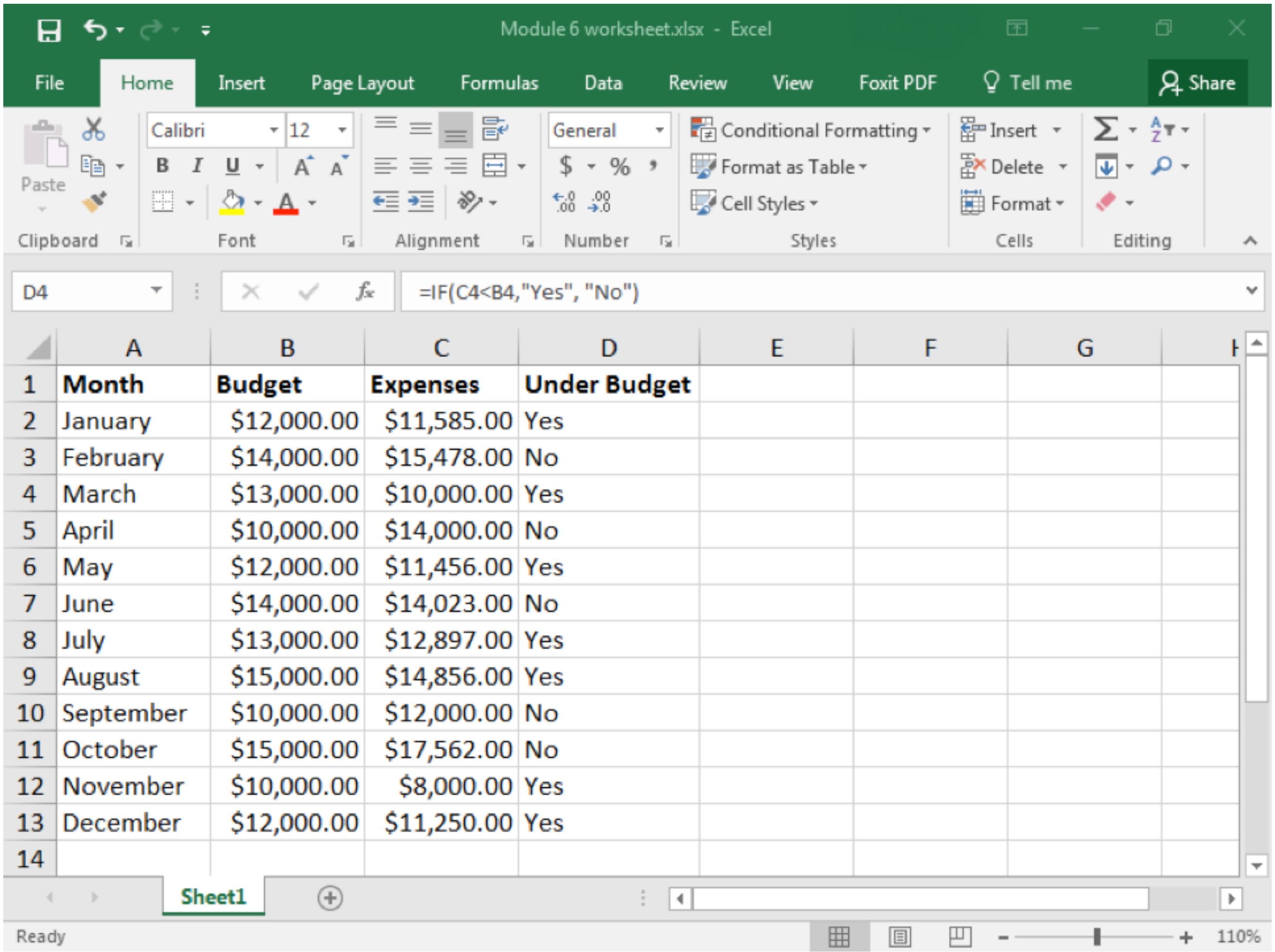


1. Click on D2 and enter the “IF” function for what you want Excel to compare and do.
   =IF(C2<B2, “Yes”,”No”)



2. You do not have to manually reenter the formula into the other cells in D. Instead you can copy and paste the formula from D2 into D3, D4, and so on. Each time you do this, the formula should automatically update with the correct cell number to compare.

As you can see, the D cells begin to display “Yes” or “No.” “Yes” means that the expenses in the C column were less than the monthly budget entered into the B column. “No” means that expenses were higher than the budget. Just as in the COUNTIF function, you need to enclose text in quotation marks.



	A	B	C	D
1	**Month**	**Budget**	**Expenses**	**Under Budget**
2	January	$12,000.00	$11,585.00	Yes
3	February	$14,000.00	$15,478.00	No
4	March	$13,000.00	$10,000.00	Yes
5	April	$10,000.00	$14,000.00	No
6	May	$12,000.00	$11,456.00	Yes
7	June	$14,000.00	$14,023.00	No
8	July	$13,000.00	$12,897.00	Yes
9	August	$15,000.00	$14,856.00	Yes
10	September	$10,000.00	$12,000.00	No
11	October	$15,000.00	$17,562.00	No
12	November	$10,000.00	$8,000.00	Yes
13	December	$12,000.00	$11,250.00	Yes
14				

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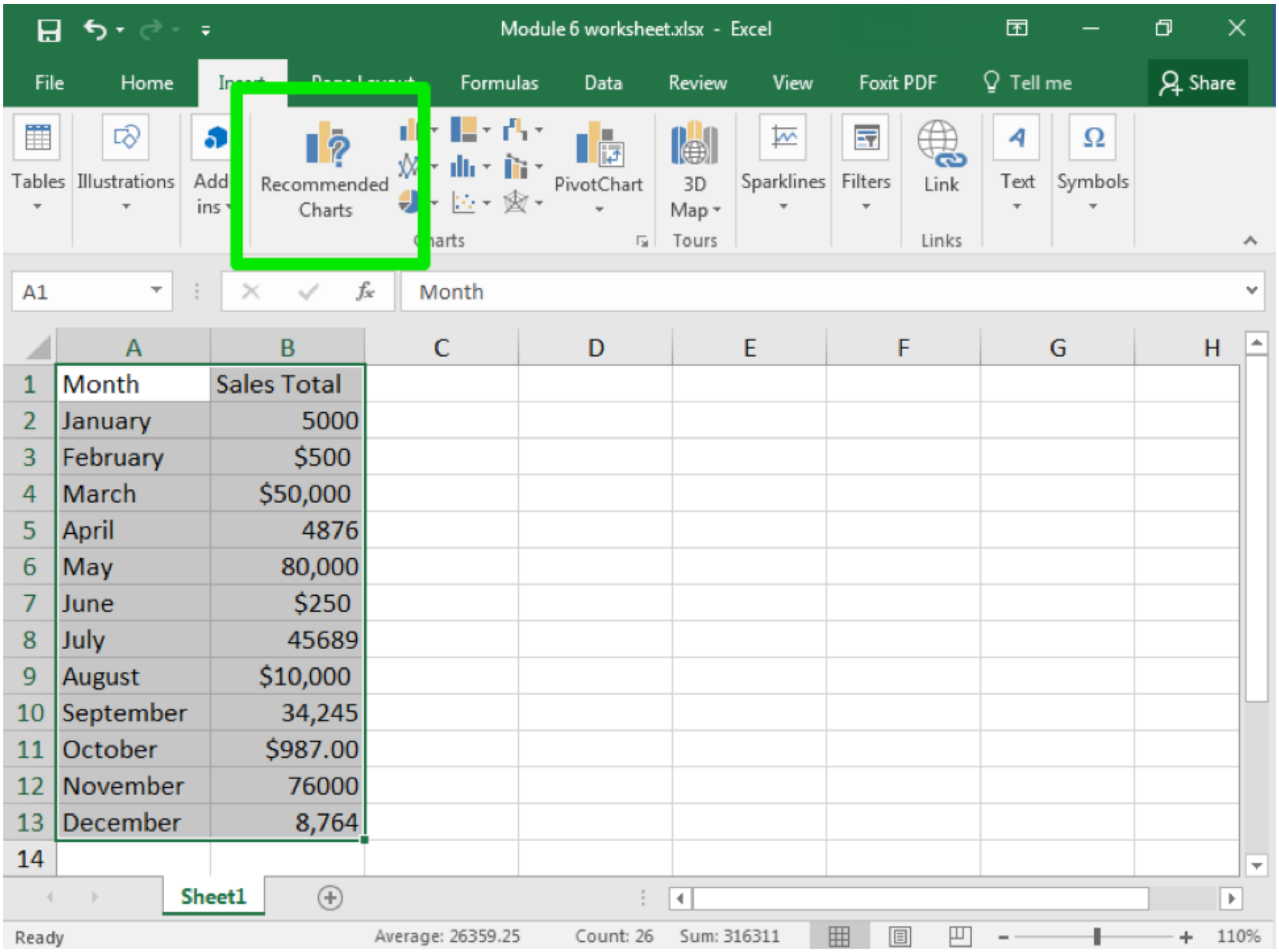
Clustered Column Charts

Excel is not just used for organizing and processing data and formulas. It also can be used to visually represent data in the form of charts and graphs. In this page, we will work on creating a basic chart, the clustered column chart, and then modifying a chart style.

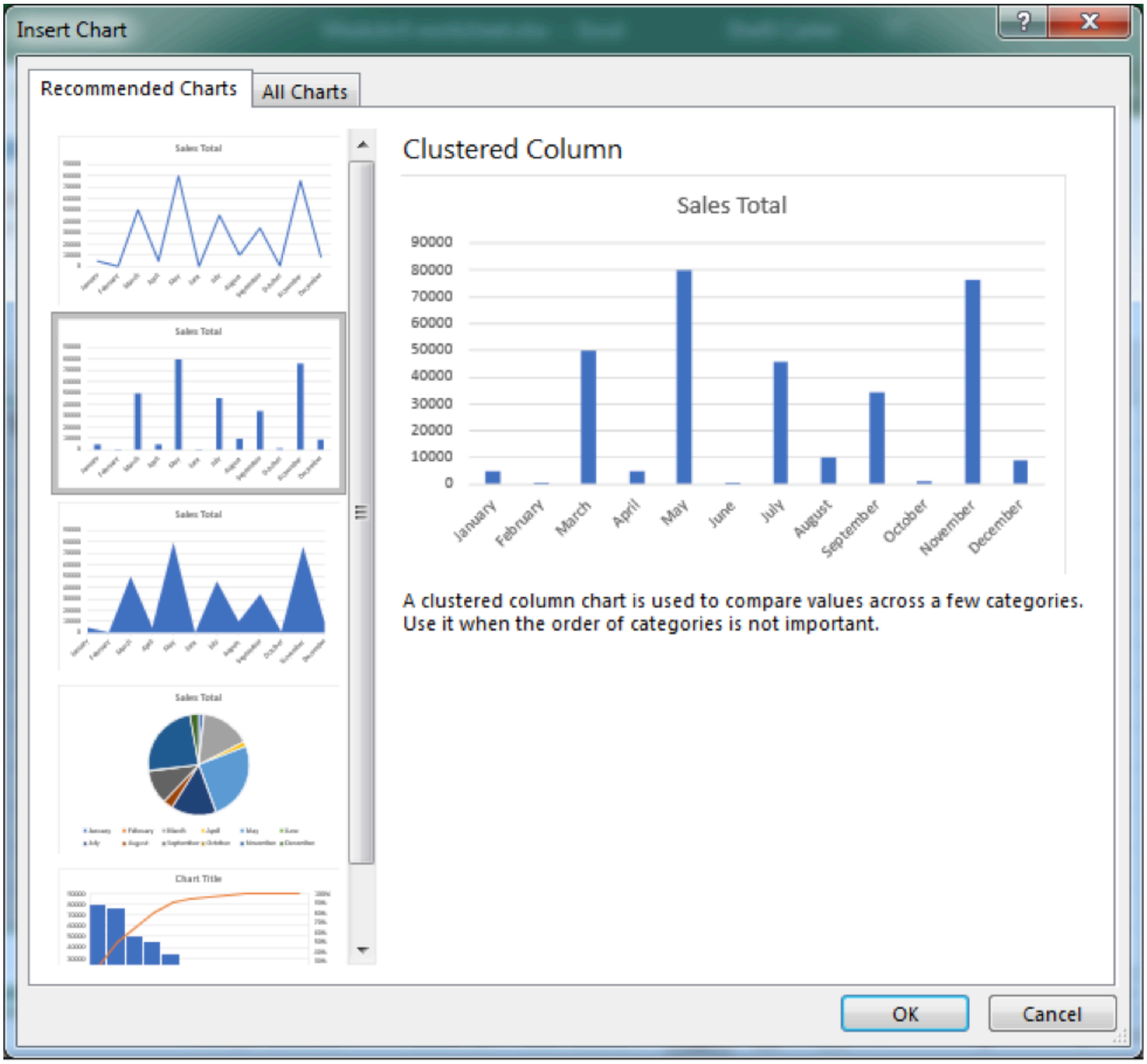
A clustered column chart is sometimes called a bar graph, because it shows data organized in solid shapes like pillars. A clustered column chart organizes these pillars up and down, so they are “columns.” On the other hand, a clustered bar graph organizes these pillars left to right, so they are “bars.” Bar graphs are useful charts when looking at changes from month to month or across employees.

The first step to creating any chart is to organize your data. It is definitely a good idea to include headers in the first cell of each column. By default, a clustered column chart will cluster the data by the columns in your table, so try to keep that in mind when setting up the worksheet.

1. After organizing your data, select the cells you wish to include in the chart. This should be at least two columns.
2. Click on the Insert tab and find the Charts group of the ribbon.



3. “Clustered column chart” is actually a recommended chart. Click on that chart.



4. When you select the chart, you will see colored boxes surrounding the data that connect to the different categories of the chart.

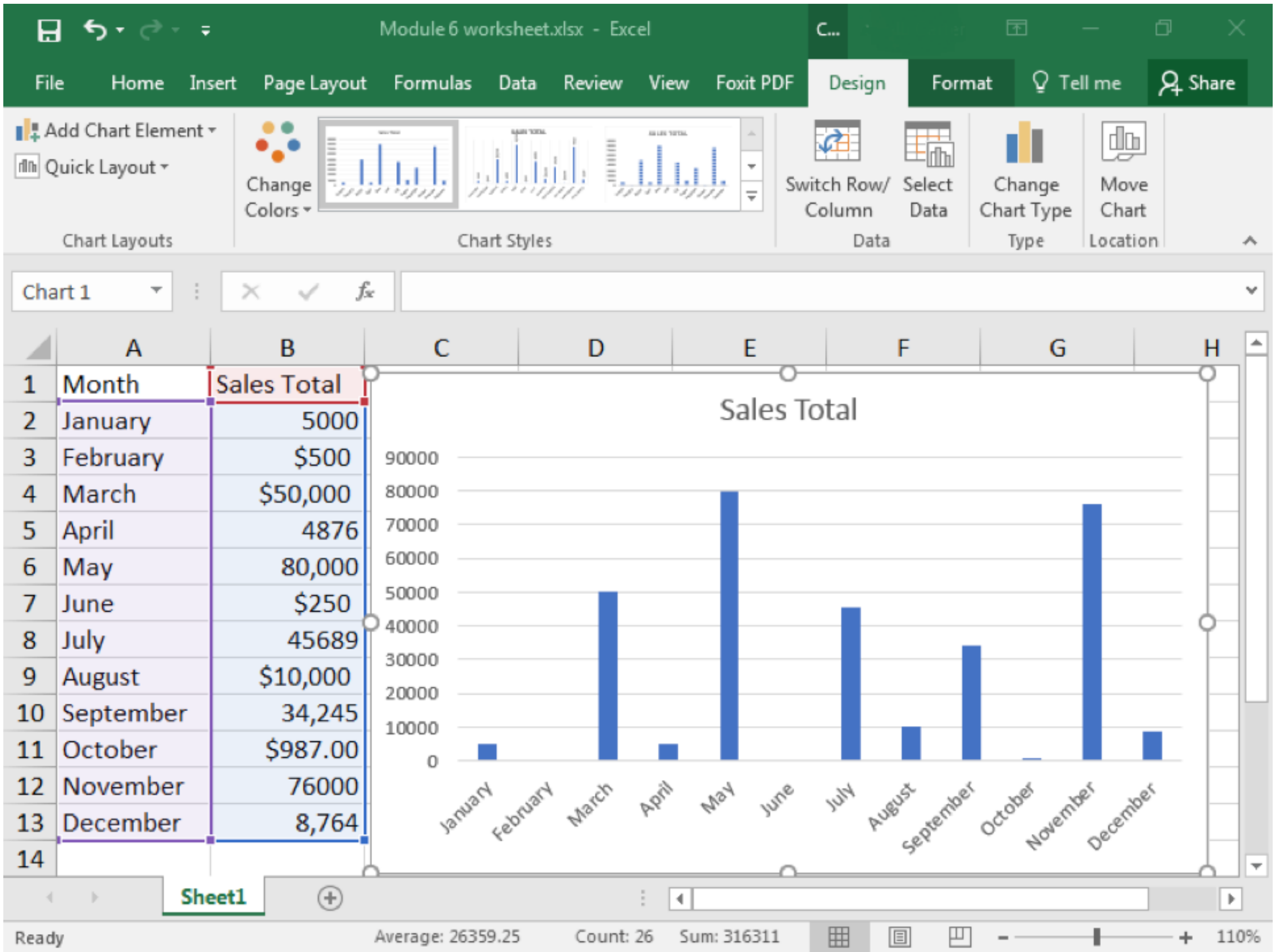


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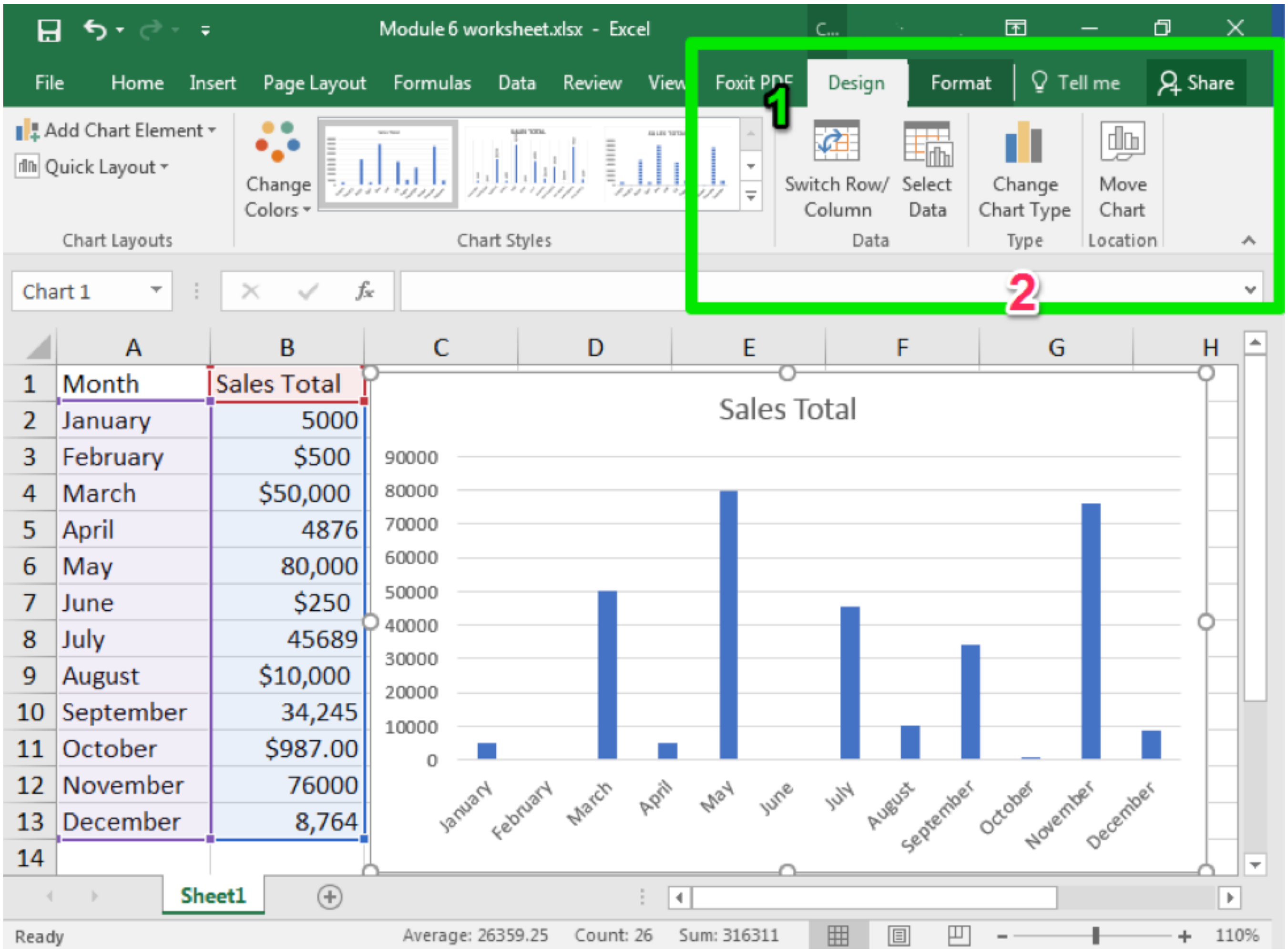
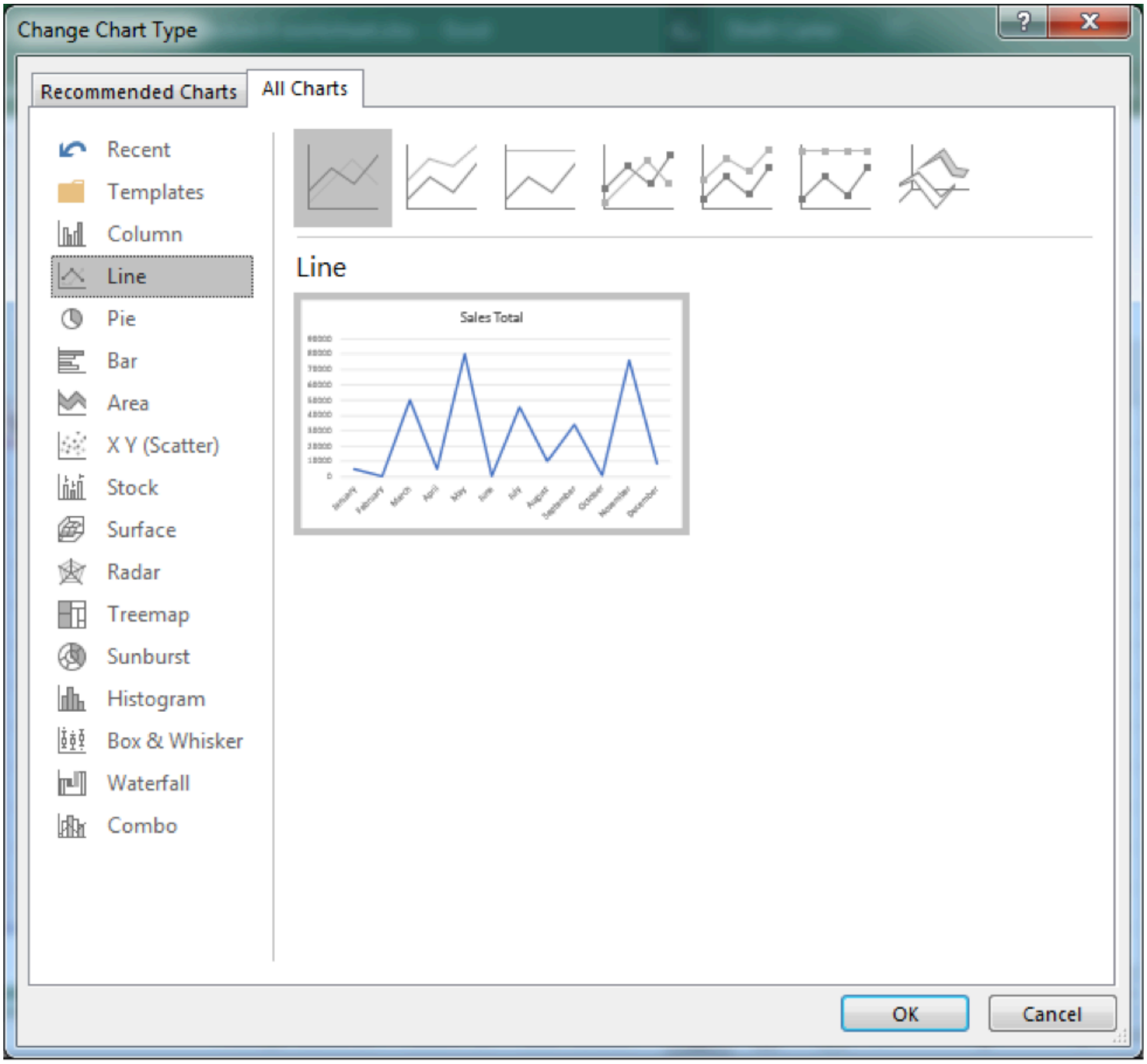
Chart Styles

Once you have created a chart, or if you are given a worksheet that contains a chart, it is very easy to change the chart style.

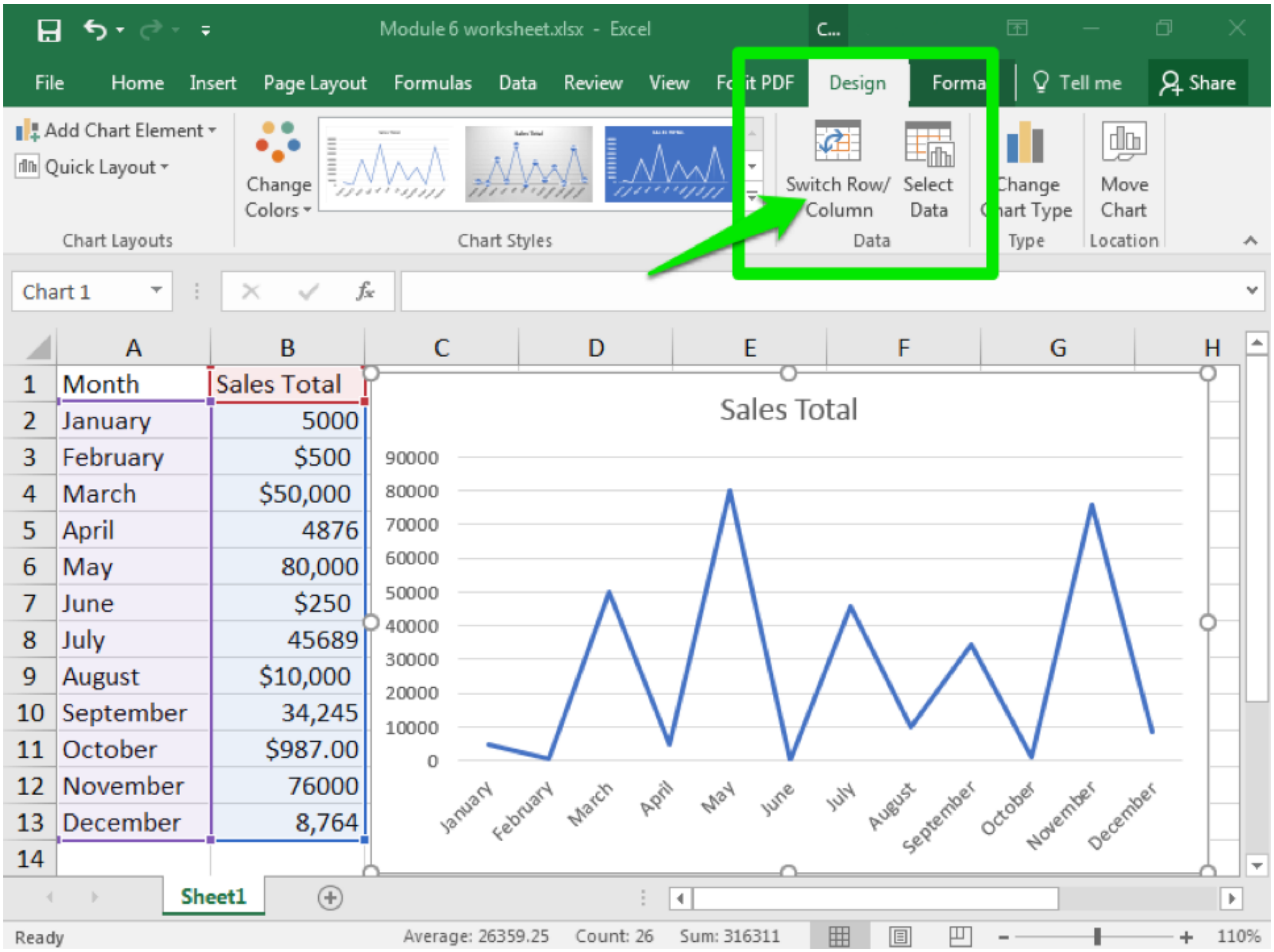
1. Click on the chart you wish to change. The Design tab should appear in the ribbon area.
2. Click on Change Chart Type button



3. Click on the type of chart you would like.



From this same window, you can also switch the data that is being charted. For example, you can switch which data from a row to a column or change which data is arranged on the x- or y-axis.

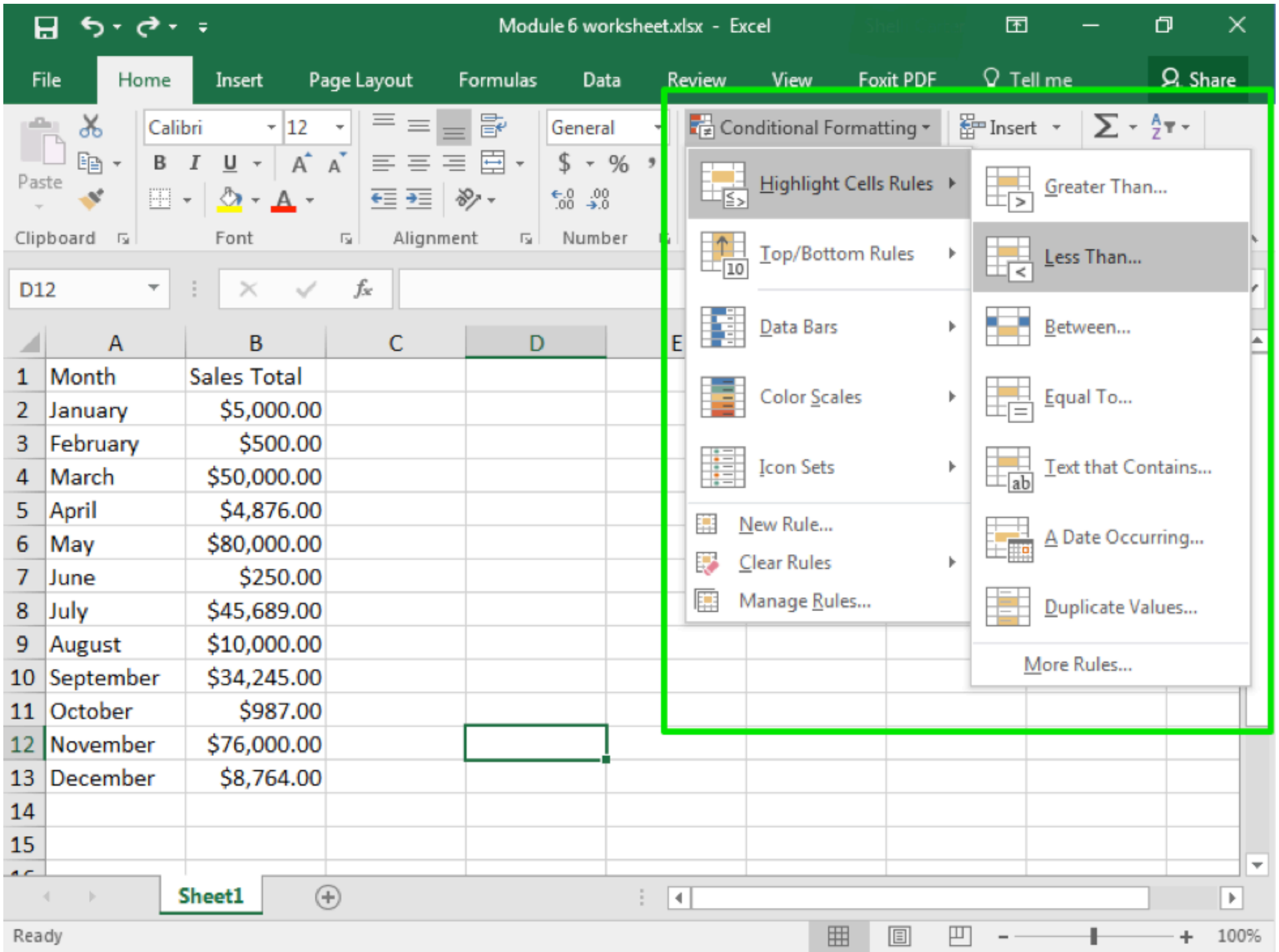


Conditional Formatting

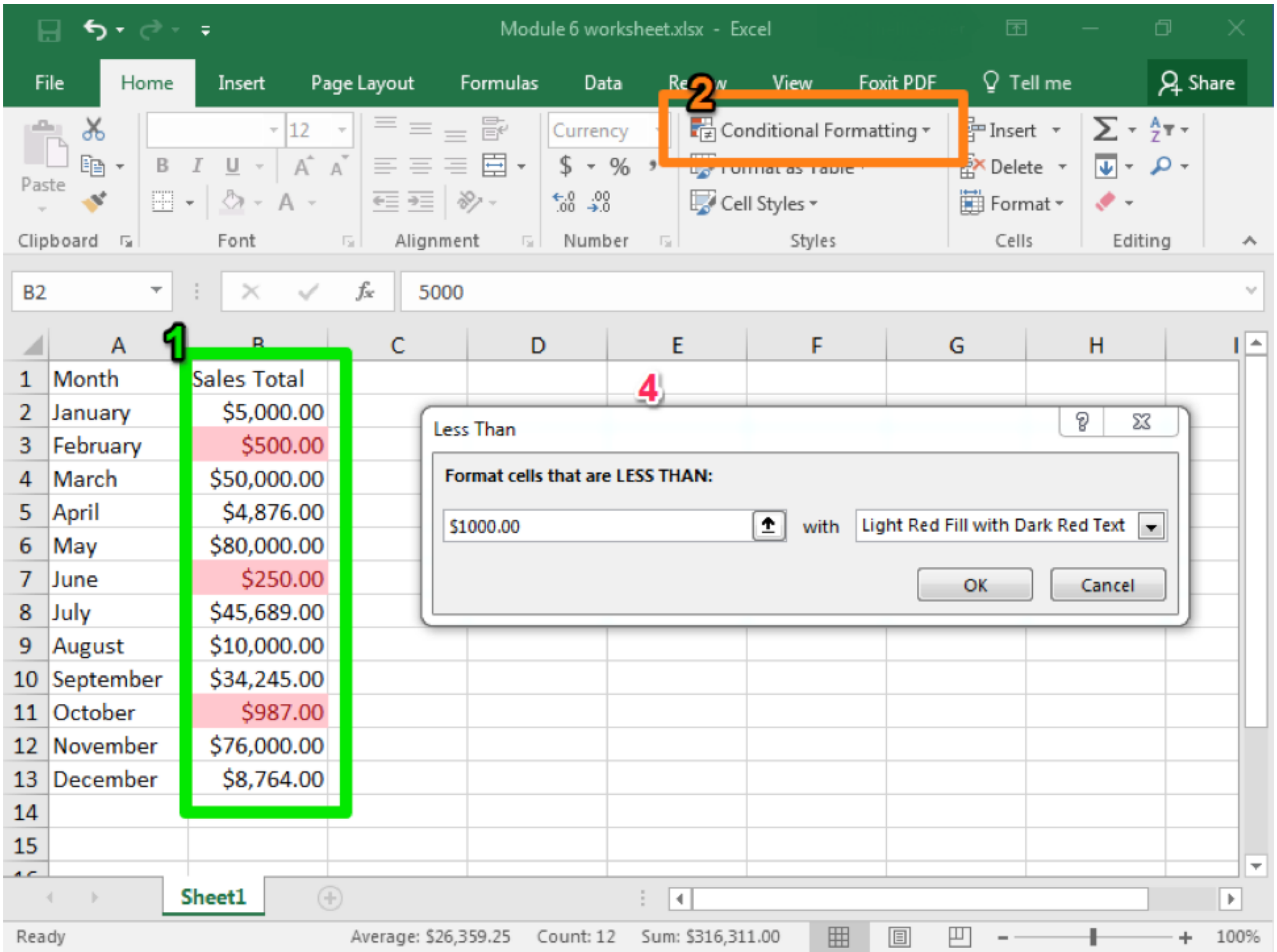
As we have learned so far, Excel has a wide variety of easy to use tools for organizing, sorting, and otherwise marking information. Think back to when we applied styles to a cell to indicate good information or information that needs to be verified. Excel also has the ability to automatically apply such markings through conditional formatting.

With conditional formatting, you provide Excel with a rule, such as “less than 10,” and the program will scan through your data and highlight all the cells that meet that rule. There are several rules already available, but you can also create and apply your own rules and visual clues.

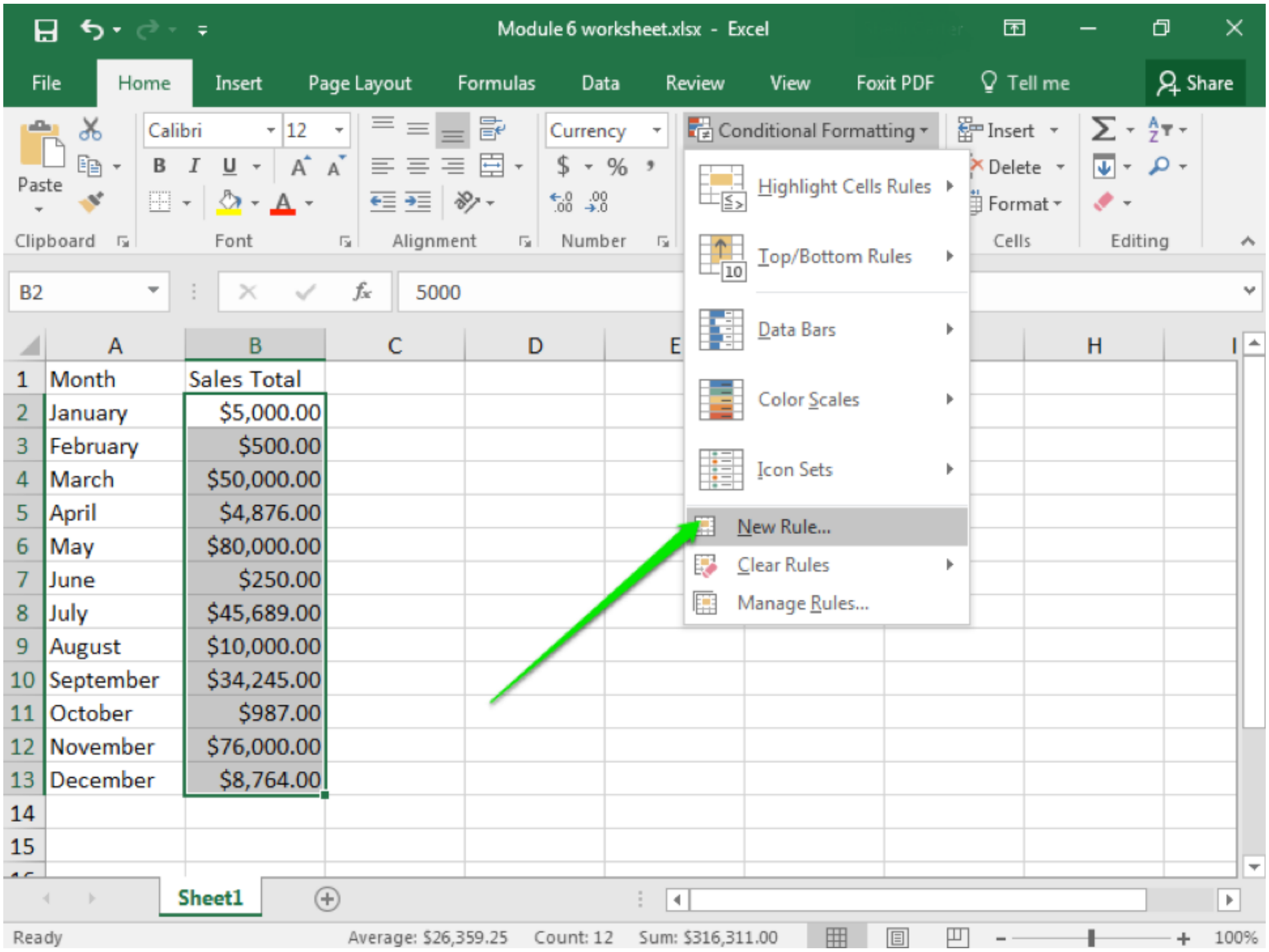
1. Select the cells, rows, or columns you wish to have conditional formatting.
2. From the Styles group, click on the Conditional Formatting button
3. Select the style of formatting you would like. Here we have Highlight Cell Rules.
4. Select the specific type of rule you would like to use and then apply your target value. Here we have selected Less Than.

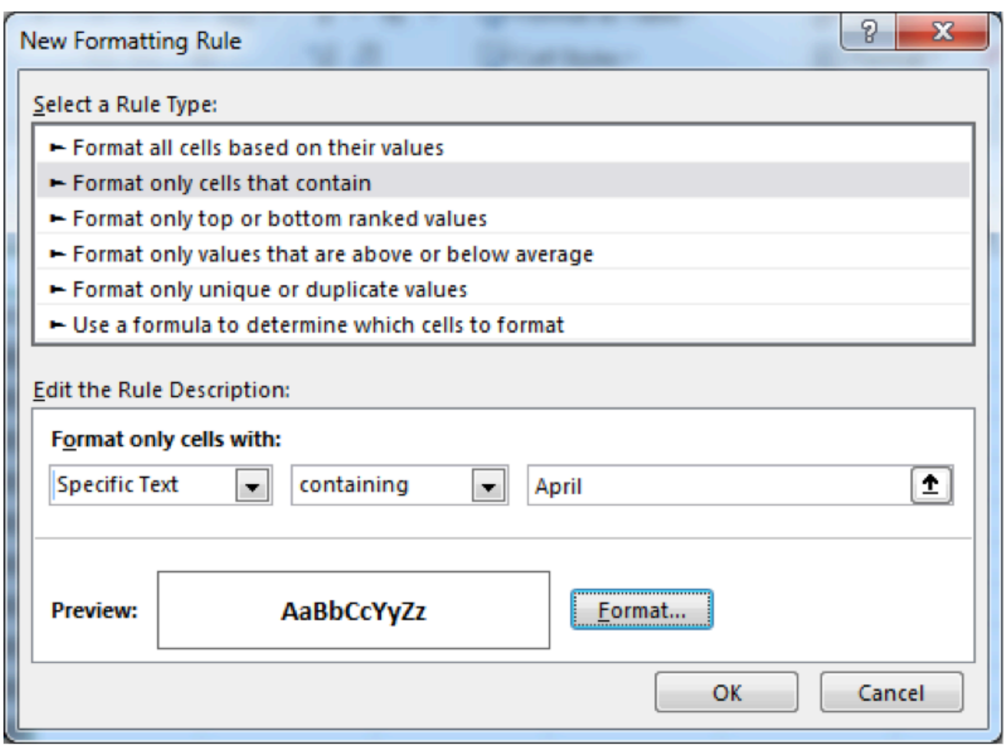


5. The formatting will appear automatically so you can see what it will look like. Note that Excel will automatically provide a value, but you can manually change it.
6. Hit OK if you wish to apply the formatting. Otherwise, when you leave the formatting menu, it will disappear.



One important tool to keep in mind is the ability to enter your own rules. This can include applying formatting to specific date ranges, to specific text (like names), or even cells that are blank. In this case, you also set the format, so instead of highlighting cells you can choose to strikethrough text or change the font, change the size, or bold the text.


Module 6 worksheet.xlsx - Excel
File Home Insert Page Layout Formulas Data Review View Foxit PDF Tell me Share
Paste
Clipboard
Calibri 12
Font
Alignment
Currency
Number
Conditional Formatting
Highlight Cells Rules
Top/Bottom Rules
Data Bars
Color Scales
Icon Sets
New Rule...
Clear Rules
Manage Rules...
Insert
Delete
Format
Cells
Editing
B2
5000
Month
Sales Total
January $5,000.00
February $500.00
March $50,000.00
April $4,876.00
May $80,000.00
June $250.00
July $45,689.00
August $10,000.00
September $34,245.00
October $987.00
November $76,000.00
December $8,764.00
Sheet1
Ready
Average: $26,359.25 Count: 12 Sum: $316,311.00
100%


New Formatting Rule
Select a Rule Type:
Format all cells based on their values
Format only cells that contain
Format only top or bottom ranked values
Format only values that are above or below average
Format only unique or duplicate values
Use a formula to determine which cells to format
Edit the Rule Description:
Format only cells with:
Specific Text
containing
April
Preview:
AaBbCcYyZz
Format...
OK
Cancel

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Working in Google Sheets

Google Sheets is very similar to Microsoft Excel. Perhaps the greatest difference between the two is Google Sheets' online functionality, which allows for real-time collaboration. Additionally, as Google Sheets is a free online tool, you can be assured everyone you'll work with has or can get access to Google Sheets, as long as they have the internet.

In Google Sheets, the creation of a spreadsheet, the manipulation of data, and the type of use and results are all very similar to usage in Microsoft Excel. Below is a screenshot of a raw and unused Google Sheet. Note the same columns and rows orientation, various ways to adjust the display of numerical data via the menu bar buttons, and formula buttons along the top bar (Figure 1).

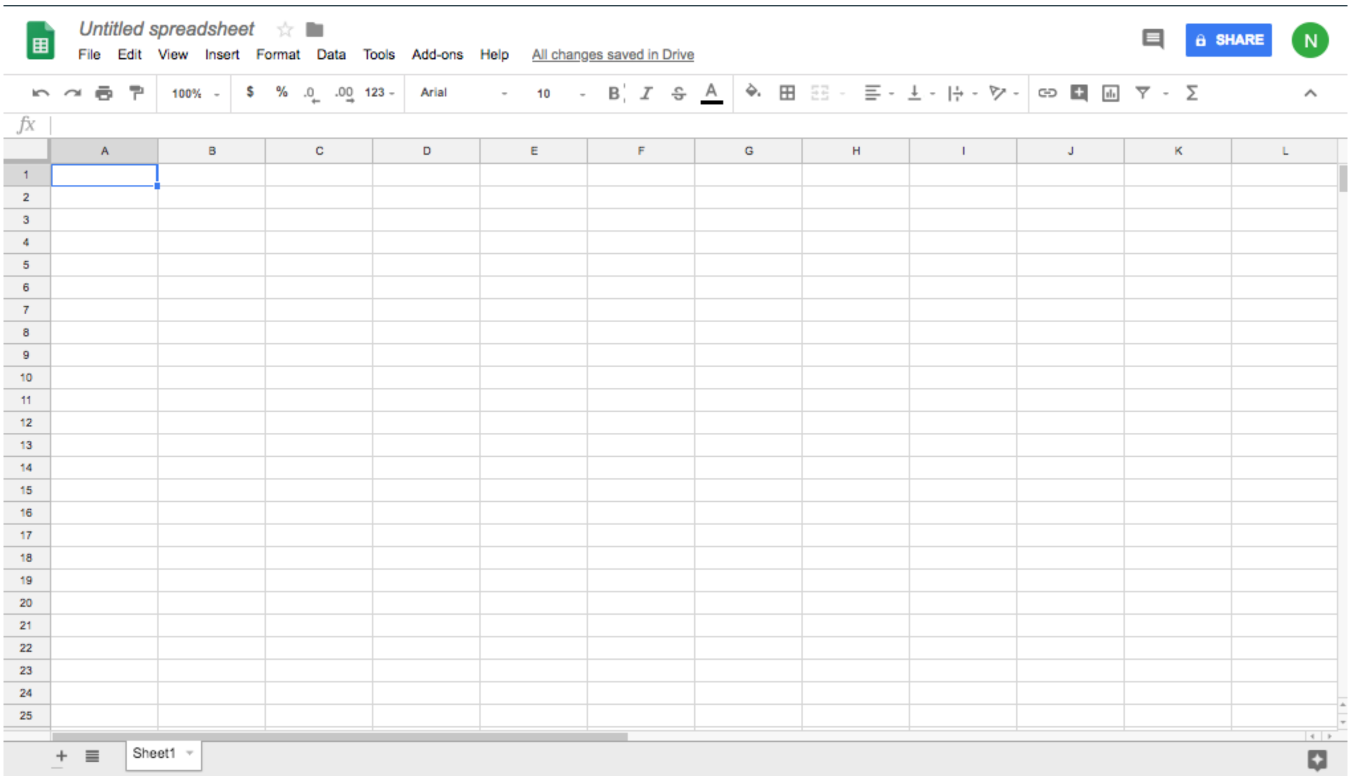

Figure 1. A new spreadsheet in Google Sheets

Learning to use Sheets is similarly helpful to learning Excel; both use the same type of data organization and manipulation, and creating a worksheet is nearly identical. Many of the skills you learned for Excel can also be applied to Google Sheets, such as basic text formatting. File extensions for Google work differently, and arguably a strength of Google Sheets over Microsoft is the ability to collaborate in the cloud real time on a given sheet.

In this page, you will learn the basics of using Google Sheets, focused on rearranging information into tables and changing style elements.

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Creating a New Speadsheet

You can open Google Sheets by logging into Google Drive on any web browser or by going directly to sheets.google.com. Once there, you'll be taken to the Google Sheets home screen (Figure 2).

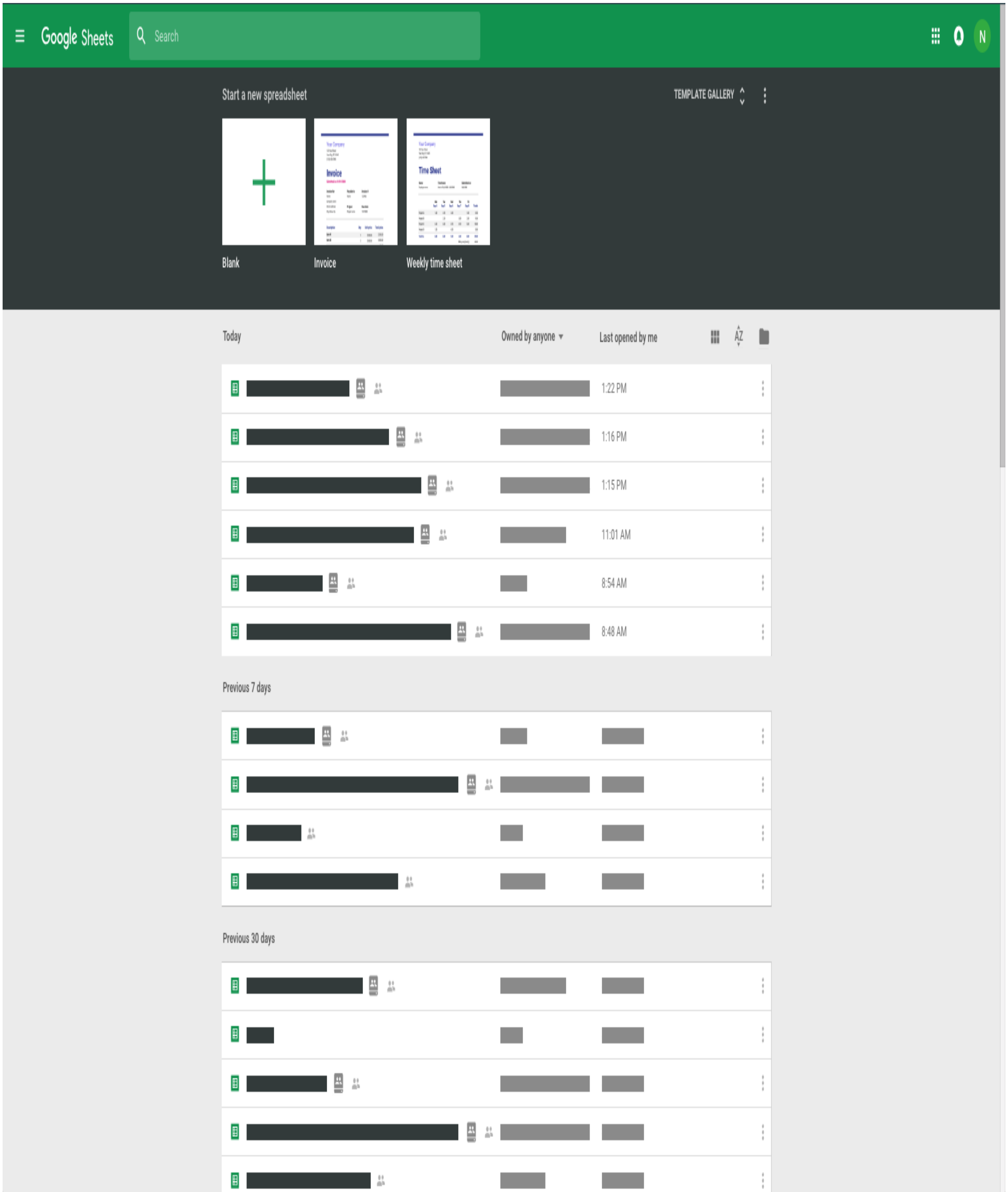

Figure 2. Creating a new spreadsheet

To create a new Google Sheet, click on the blank tile with the large green + symbol (as seen in the upper left of Figure 2). This will open a new sheet identical to the blank sheet seen in Figure 1.

Using Google Sheets

Most of what you see is very similar to Excel. Arguably, Excel has more functionality, and it probably should be used if large data crunching—pages and pages of data—is necessary. For minor data analysis, or for looking at flow charts or other data visually, Google Sheets is probably better than Excel. This is true particularly if you consider the robust sharing features that come with Google Drive. Microsoft Office also has online, cloud-based sharing. Our recommendation would be to experiment with both for your research needs.

Like Excel, Sheets has the following exact terms:

1. Cell. This is the area where you will enter data.
2. Row. Rows are cells aligned horizontally.
3. Column. Columns are cells aligned vertically.
4. Worksheet. A worksheet is a single page within a workbook. Like the tabs in an internet browser, the tabs in a Google Sheets workbook show different pages, or worksheets. A workbook may have many worksheets included in it. In this screenshot, the workbook has only one worksheet and one tab, which is labeled Sheet1. The selected tab shows the selected worksheet. Clicking the + button will add another worksheet. Saving is automatic in Google; when you build more sheets, they will all be saved in that workbook.

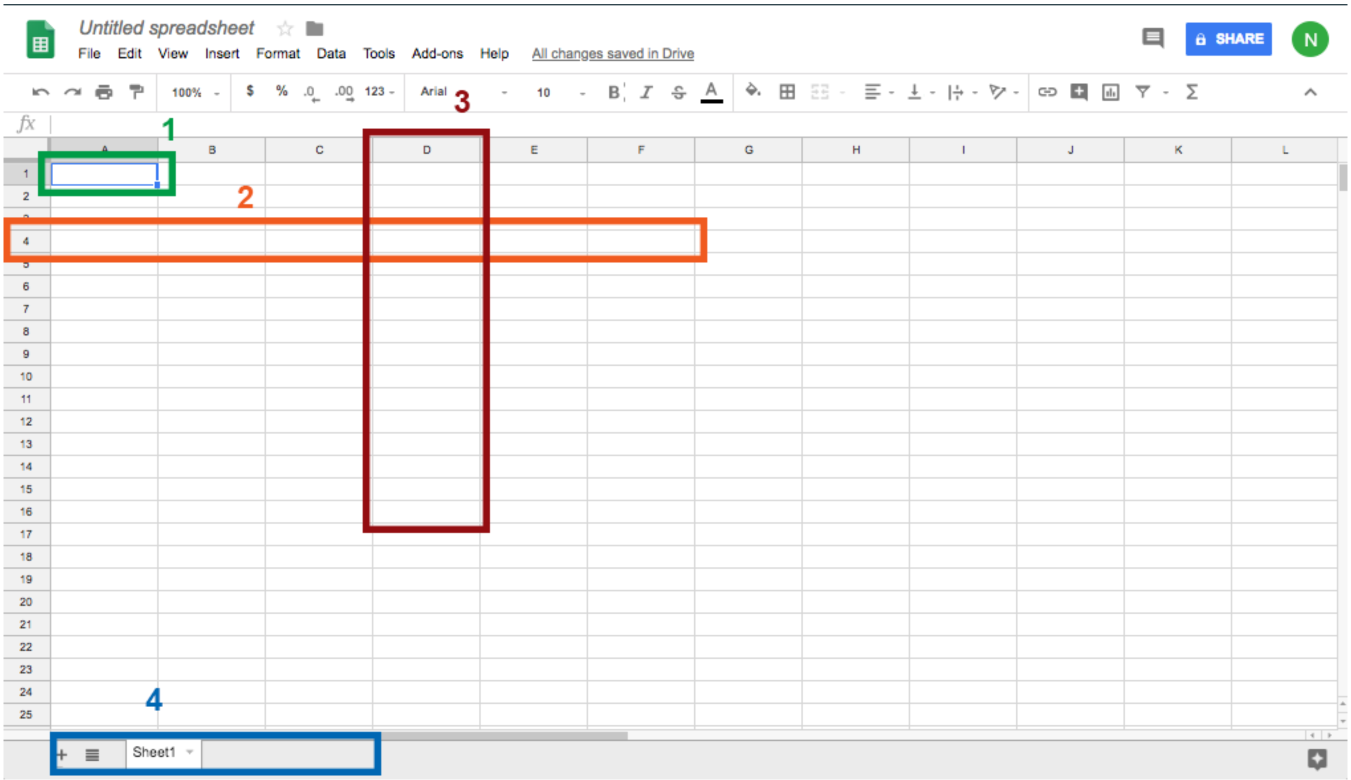

Figure 3. Four primary components of a spreadsheet

Add-ons

While the majority of Google Sheets is almost identical to Microsoft Excel, there are notable differences. The primary difference we'll focus on here are Google Sheets add-ons, which you can access in a drop-down menu (Figure 4).

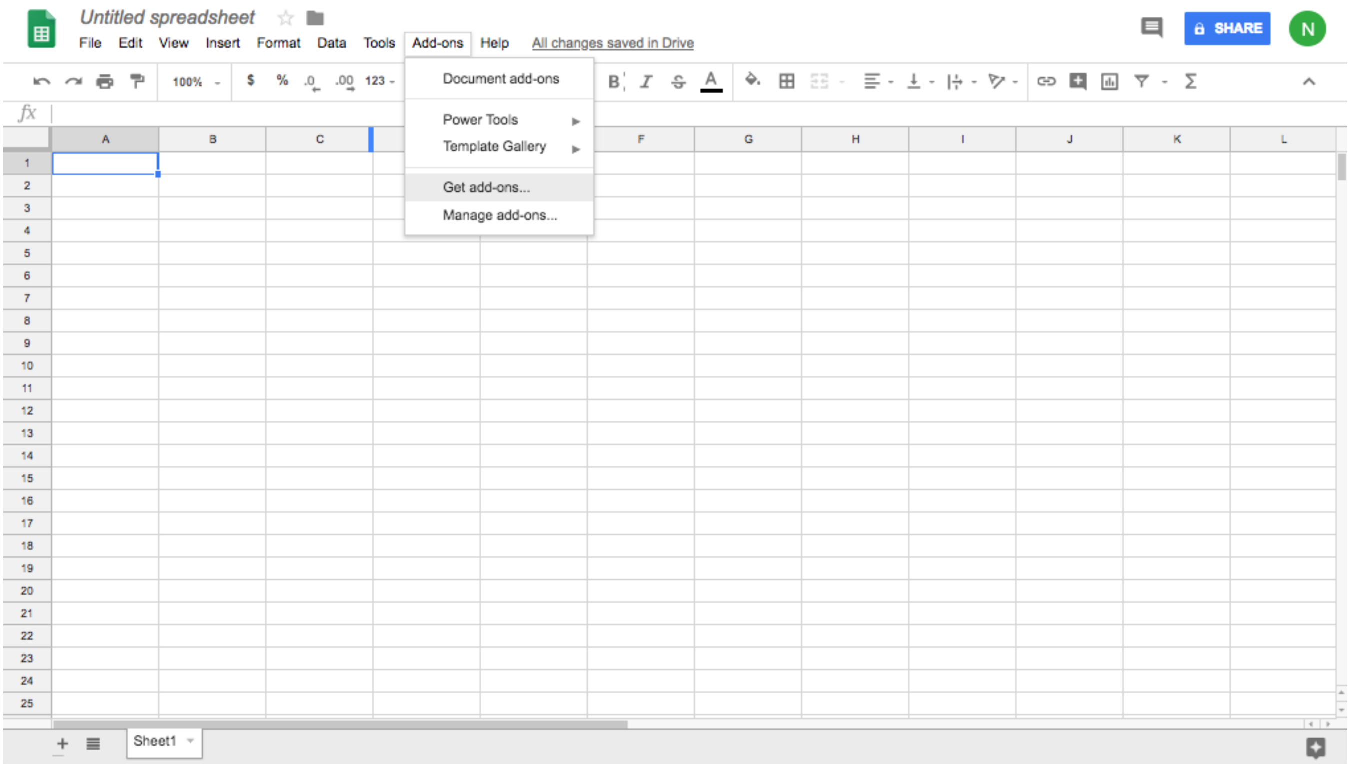

Figure 4. Add-ons are accessible through the menu bar

A strength of Google Drive, and Google's office suite writ large, is the addition of third party add-ons. These range from styles that can change the look and feel of a given Sheet (see Figure 5), to the addition of macros or tools that help with grading or other type of data analysis. Depending on your data and goals for using the data, you can choose from literally thousands of options. If you are looking for a particular functionality, you can use the search bar in the upper-right corner of the add-ons window (Figure 5).

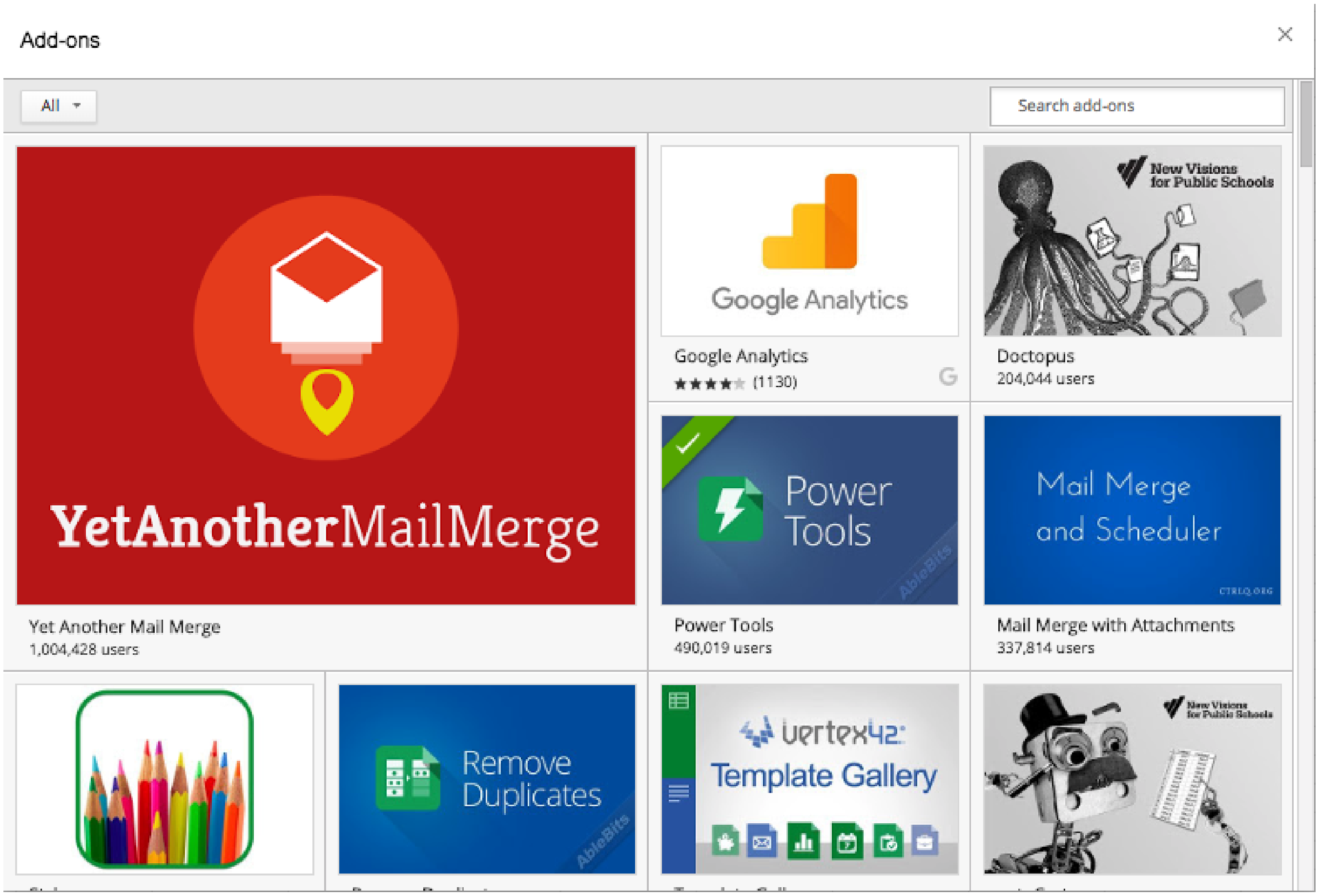

Figure 5. There are a huge variety of add-ons available in Google Sheets.

These add-ons can be used for a variety of purposes, most of which revolve around adding or "popping" functionality into the spreadsheet itself.

VERTEX TEMPLATE GALLERY

The Vertex Template Gallery (seen in the bottom row of Figure 5) gives you the option to use several pre-built templates ranging from project management/waterfall planning tools, to budget sheets and even survey forms.

For your business research needs, there are a few key strengths of Google Sheets to consider. Michael Ansaldo, of *PC World*, wrote that users should consider Sheets when the following are key aspects of your project: (Note: Ansaldo, Michael. "Microsoft Excel vs. Google Sheets: The 4 key ways Sheets beats Excel." *PCWorld*. Sep 28, 2015. Web. 12 June 2018.)

1. Cost: Google is free to use, which can be particularly useful for smaller or newer teams where money is often much tighter.
2. Collaboration: Google Sheets is better suited to collaboration between multiple parties, particularly if you need to write on the same spreadsheet in real time from various computers and places. Using a shared spreadsheet can cut down on time and confusion.
3. Google Integration. Google has created a host of tools that provide unique functions, and these tools can integrate seamlessly with Google Sheets.
4. Tracking Changes. Google Sheets automatically keeps track of the version history of a document, as well as keeping track of who made changes (as long as a user is signed in).

In his article, Anslado expands on the utility of Google integration: (Note: Ibid.)

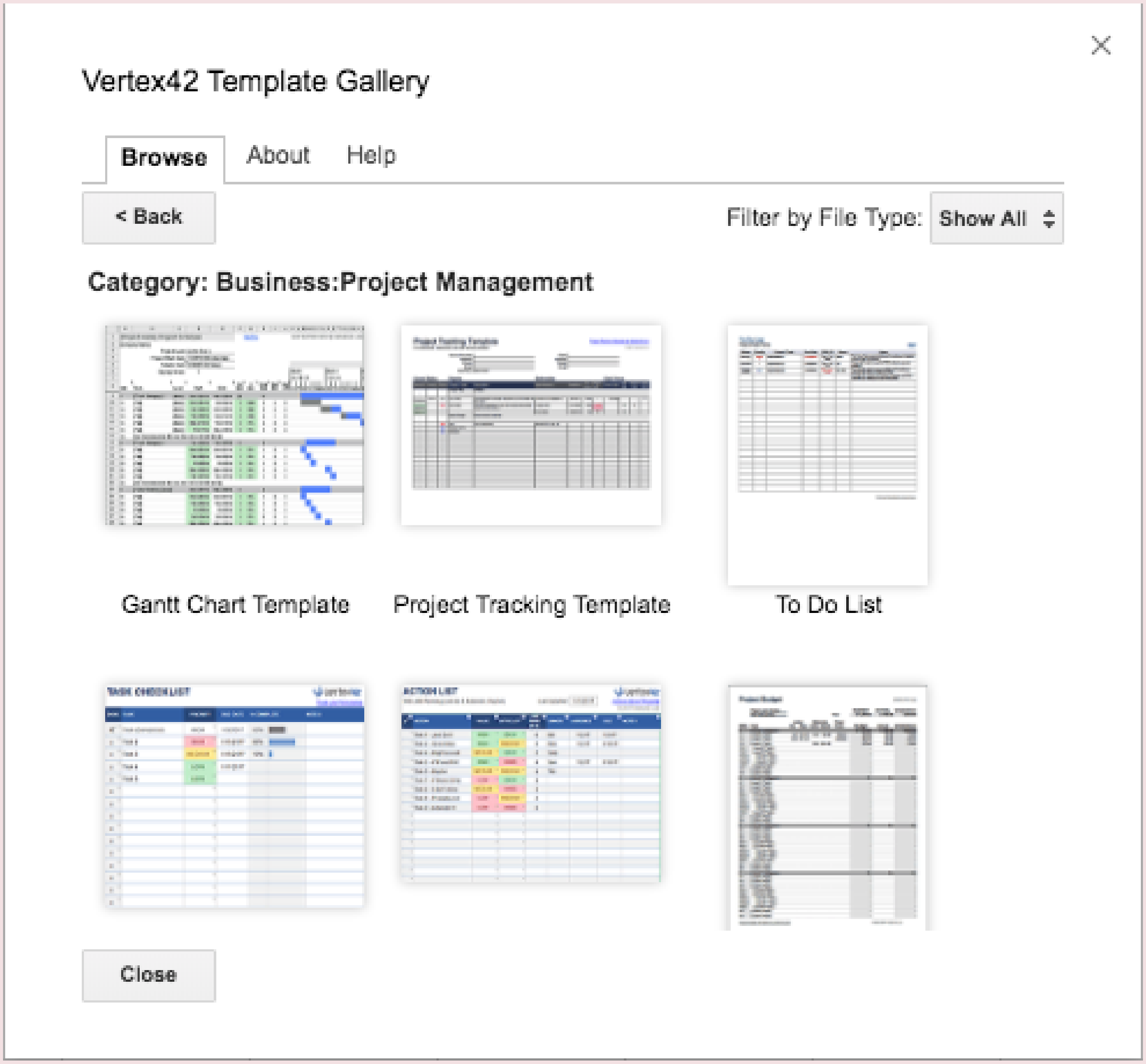

Figure 6. Templates available through Vertex Template Gallery

Because of its tight integration with Google, Sheets can import all kinds of data from other Google services and the web at large. You can translate the contents of a cell using the function GOOGLETRANSLATE(), or you can fetch current or historical securities info from Google Finance with the function GOOGLEFINANCE(). And with Sheets IMPORTFEED and IMPORTDATA functions, you can pull information from the internet directly into your spreadsheet.

IN SUMMARY

Both Microsoft Excel and Google Sheets are excellent spreadsheet tools. Both have similar functionality, and use formulas to “crunch” quantitative data. Arguably for business report writing, Google Sheets might be better, especially if there is a need to collaborate on the same sheet in real time.

FINDING SECONDARY SOURCES

What you'll learn to do: Evaluate and practice preliminary, intermediate, and advanced search techniques

Have you ever heard a song, made a mental note to look up its name, but then forgot all of the words? You remember wanting to hear it again and add it to your workout playlist, but all you remember is a short bit of the tune? How did you go about finding the song?

Chances are, you had to:

- **Investigate** to find out the song's melody. Maybe you hummed the tune for a few friends, or remember that it sounded somewhat similar to another song you already heard, and used that song as a reference point.
- **Investigate** to find out the song's title ("E.T.," "The Lazy Song," "Born This Way," "Latinoamérica").
- **Investigate** to find out who performed the song (Lady Gaga, Bruno Mars, Katy Perry, Maroon 5, Kanye West, Calle 13).
- **Investigate** to find out what CD that song was on (*Teenage Dream, Doo-Wops & Hooligans, Born This Way, Entren Los Que Quieran*) and if there are other songs you might also enjoy.
- **Investigate** to find out where you can purchase or download the song for the best price.

You can't—and won't—get what you want without **investigating**. And it's really no different with researching. Investigating is essential to your research because the questions you ask and the places you look will give you the results you need to create a convincing and compelling argument. Researching will take time and effort, so it pays off to take the time up front to learn about the best strategies for maximizing your research in order to identify and utilize the best sources. The wrong approach can waste your time and effort and result in a weak paper or report.

So, where do you start investigating? First, you'll want to follow the research process. Once you have a good understanding of your research assignment and goals, you can begin to search for the right sources. In this section, you'll learn how follow the research process in order to carefully use search engines and library databases to find articles you'll need to write a top notch paper.

LEARNING OUTCOMES

- Evaluate preliminary research strategies
- Discuss common tools and strategies for completing online searches

- Identify tools used to find scholarly secondary sources

Preliminary Research Strategies

As we have discussed, all research is based upon your research question. Having a well-defined and scoped question is essential to a good research strategy. If your question is not specific enough, or if it lacks boundaries (i.e., it is not well-scoped), your subsequent strategy will be difficult to maintain.

Steely Library discusses developing a good research question in the video below:

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THE HUMAN FUND

Let's return to Martha's case. We can recall that her research question was,

> *"Is The Human Fund's work helping homeless families in downtown Chicago?"*

If we first break her question down into its sub-parts, developing a research strategy will be much easier. Her question asks,

1. Is The Human Fund's work — i.e., what The Human Fund does — its actions
2. helping — i.e., we must define "helping" in relation to…
3. …the homeless families…
4. …in downtown Chicago?

From her question, we know that we will need sources that,

1. Outline The Human Fund's activities
2. Define how charities and government help the homeless in their cities
3. Help to define and understand "homeless"
4. Are geographically bound to downtown Chicago

With the above in mind, any secondary source that does not specifically address a part of the question above—and how it is broken down—will be off topic or out of scope.

We will also recall that Martha conducted background reading (i.e., secondary source reading) before determining the type of primary source material (i.e., fieldwork and interviews with the homeless) she would use. This can be confusing; when we research, we do background or secondary source reading before determining what primary source material might still be needed. You will *not* typically see a research process that advocates doing primary source research when there is already secondary source material available on a given topic because it is not efficient. It is also important to note that if secondary source material sufficiently addresses your research question, consider this to be a win; this means that the much slower and much more elaborate primary source research process is no longer required. Your report will be that much faster to compile. If Martha, for example, had recent accounts of interviews with homeless people in downtown Chicago about The Human Fund's work, she would not need to conduct her own interviews.

PRACTICE QUESTIONS

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Finding Sources

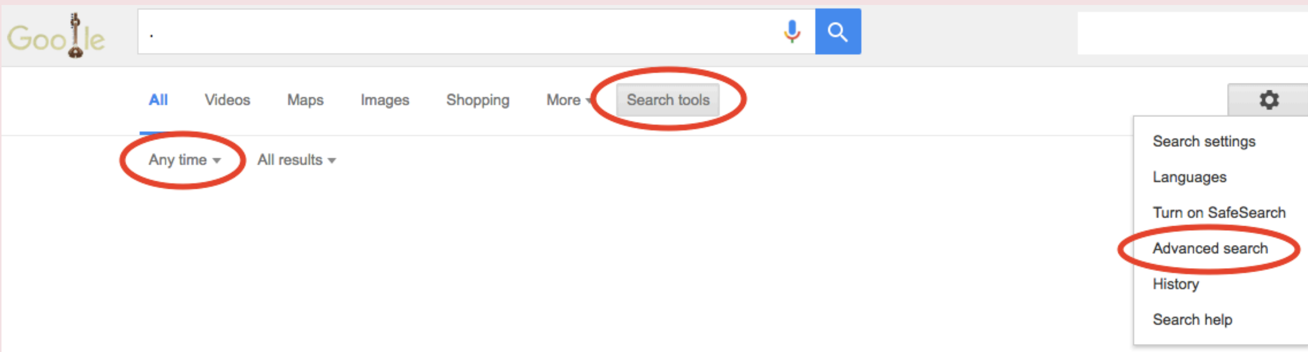
For our purposes here, and with respect to business report writing, it's important to know how to make the most of generic online searches. While Google Scholar and library databases will be the most valuable tools for finding academic information, many business reports will only need information that is easily available from Google. As you find sources pertinent to your report, be sure to keep track of them so you can cite and reference them later.

When you search for information using keywords in Google, you may yield thousands or millions of search results, and they do not appear in order of credibility or relevance. Use a cautious eye and try different keywords or various combinations in order to find different results. You can also try using different Boolean operators (words like AND, OR, or NOT), or use the Google advanced search features to narrow down your results. Work to simplify your search phrases, and be patient in moving through results pages.

PRELIMINARY SEARCH TIPS

1. Wikipedia can be a great starting point for information, but depending on your research, it is not recommended for use as an official source. It's helpful to look at the links and references at the bottom of the page for more ideas.
2. Use "Ctrl+F" to find certain words within a webpage in order to jump to the sections of the article that interest you.
3. Use Google Advanced Search to be more specific in your search. You can also use tricks to be more specific within the main Google Search Engine:
    1. Use quotation marks to narrow your search from just tanks in WWII to "Tanks in WWII" or "Tanks" in "WWII".

2. Find specific types of websites by adding “site:.gov” or “site:.edu” or “site:.org”. You can also search for specific file types like “filetype:.pdf”.
4. Click on “Search Tools” under the search bar in Google and select “Any time” to see a list of options for time periods to help limit your search. You can find information just in the past month or year, or even for a custom range.



Use features already available through Google Search, such as Search Tools and Advanced Search to narrow and refine your results.

PRACTICE QUESTION

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LEARN MORE

Check out this article on “Google-Fu” to learn more about how you can best use the search tools available to you.

Using Databases

In the event Google or other search engines do not yield quality sources, you may find yourself requiring higher level library access. This brings us to two other areas for secondary source material:

1. Google Scholar
2. Library databases

Google Scholar

Google Scholar is an excellent and more refined version of Google that focuses on professional literature. While you can use Google Scholar for free, the results will likely be paywall-protected academic material, so you will need a library for access. Some public libraries offer this for free to their constituents, or if you are a faculty or student at a college or university, you also can gain immediate access to paid content. What Google Scholar can help you gather free of charge is awareness about what type of data may exist. This is important for your business report writing. If data exists, but only behind a paywall, then you may consider conducting your own primary source development (i.e, your own fieldwork such as surveys or interviews) depending on how robust your report needs to be.

For our purposes here, look at Figure 1 and compare the results of the captured search to the previous searches where we just used a standard Google search.

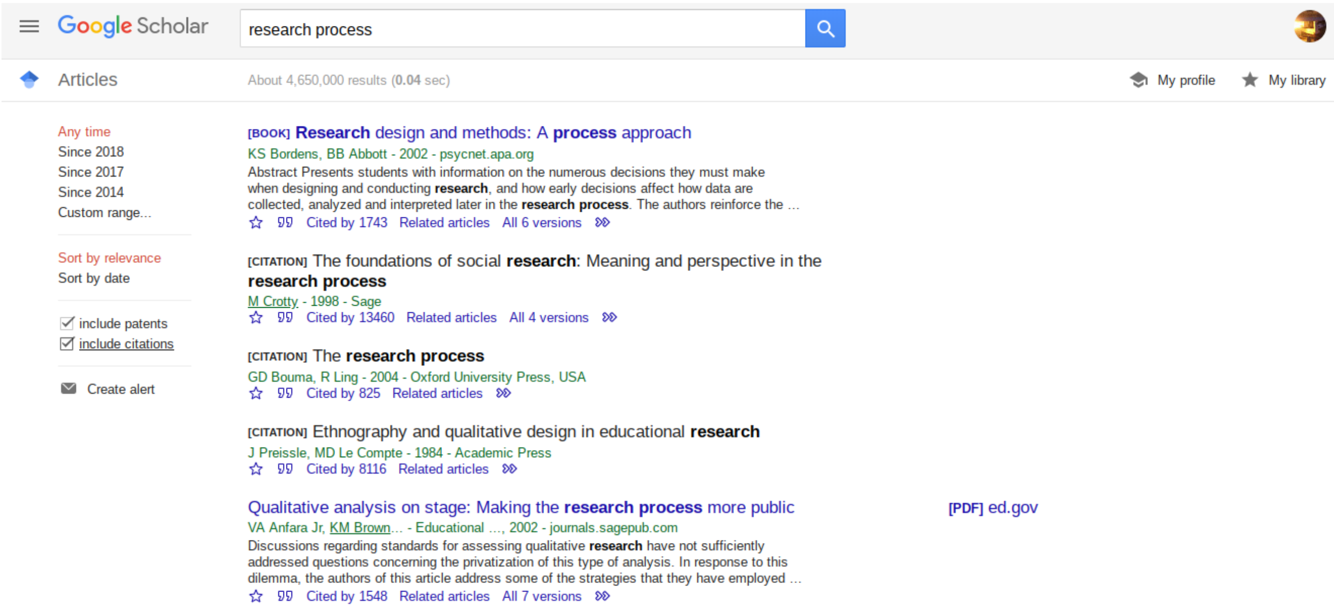

Figure 1. An example search in Google Scholar

One of the things that Google Scholar does very well is tell you what type of source it is right away. Note how the first listing is a book published in 2002. This book is likely readily available in a library, or it could be purchased online. The sources in Figure 1 are a mix of other books and articles in professional journals.

PRACTICE QUESTIONS

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Library Databases

As mentioned above, in order to access professional journals, you will need higher-end and paywall-guarded database access. However, some institutions (particularly institutions with more academic leanings) will provide their employees with access to these. Public libraries also often have access to many databases. Databases come in all shapes and sizes and are not necessarily just troves of quantitative figures and facts. The video below describes databases, and their use:

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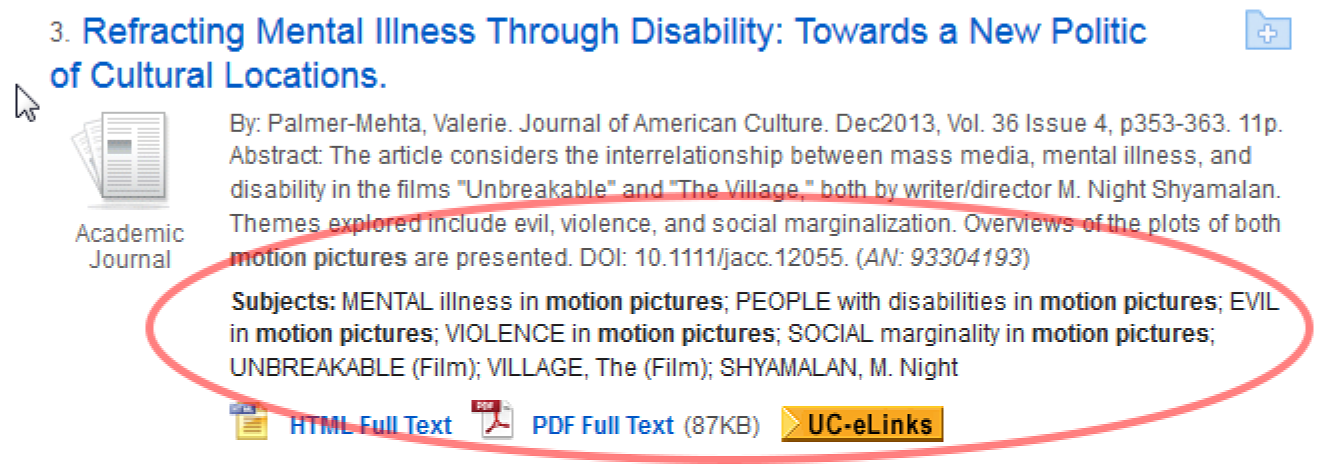
Finding Sources From Databases

If you have access to a library database, it can be a helpful tool in finding additional sources.

Subject Headings

Most databases will include related subject headings alongside each search result. Subject headings are a form of descriptive metadata. At their simplest, they may be tags chosen by the authors, but most databases use a controlled vocabulary assigned by professional catalogers

The advantage of controlled subject terms is that they're standardized terms that will be assigned to all appropriate content no matter what terminology (or even language) is used by the author. For example, the database Academic Search Complete uses the subject term "motion pictures," even if the article uses the words "films," "movies," or "cinema."



Whenever you find a good article in a database, check out the subject headings. If one or more of them look like matches for your topic, re-run your search using those terms—and be sure to specify you want those terms in the subject field. That will ensure the search results are really about that subject and don't just happen to mention those words in passing somehow.

Follow the Bibliographic Links

As long as you find one good scholarly article or book, you can look up the works cited in the footnotes or bibliography to find the sources it's based on.

You can also follow citations forward in time by looking up who cited the work you have. Web of Science has cited reference searches.

SOURCE ANALYSIS

What you'll learn to do: Evaluate and practice methods of analysis to assess the quality and reliability of a source

Sources come in all shapes and sizes. In order to use them effectively in your report writing, you will have to assess their quality and reliability.

In this section, we will look at a few of the more prominent and well-known techniques; these will be more than sufficient for most of your report writing needs. After you review and practice this material, you should feel confident in evaluating sources and will have the key tools to determine the best ones to use.

LEARNING OUTCOMES

- Identify the seven pillars of information literacy
- Discuss the importance of evaluating sources and understanding biases
- Describe the components of the CRAAP analysis process
- Describe techniques to incorporate sources into your writing

Information Literacy

People will often talk about the importance of information literacy, but just what does it mean to be information literate? The American Library Association defines information literacy as the ability to "recognize when information is needed and have the ability to locate, evaluate, and use effectively the needed information." (Note: American Library Association. Presidential Committee on Information Literacy. Final Report. (Chicago: American Library Association, 1989.))

The Society of College, National and University Libraries (SCONUL) 7 Pillars of Information Literacy provides a framework strategy for assembling material for your research project. If you follow this strategy, you can consider yourself information literate.

The pillars are as follows:

- **Identify** what you need to find out.
- **Assess** current knowledge, identify your personal knowledge gaps, and understand what types of information are available.
- **Plan** where you'll locate data and how you'll use it.
- **Gather** data needed, keeping track of where you found your information
- **Evaluate** both your research process and the information your find; compare and analyze data.
- **Manage** the information you've gathered professionally and ethically—cite all of your sources.
- **Present** the knowledge you've gained, disseminating information to others and apply your knowledge to your life.

PRACTICE QUESTIONS

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Once you've evaluated your personal skill set, you can identify gaps in your current material or sources. This can be particularly helpful when determining whether any primary source research is required, and especially whether you would need to conduct any of your own fieldwork (i.e., surveys, interviews, observations, etc.).

WATCH THIS

This video provides an alternate presentation of the seven pillars, diving into each component a bit deeper.

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Evaluating Sources

Perhaps never before in mainstream discussion has the importance of evaluating sources been more important. The effect of "fake news," and contested information is now a common feature of contemporary life. When evaluating sources, for which a variety of good techniques and rules of thumb exist, we argue that doing so is an essential part of critical thinking, which is the bedrock for good communication and report writing in any field.

THE HUMAN FUND

To illustrate the importance of evaluating sources, consider our case study with Martha of The Human Fund. Recall that she read a variety of secondary source materials after developing her research question. In addition to ensuring her sources were scoped properly—that they addressed elements of her research question—she would need to evaluate their authorship, determine how recent and reliable the information is, and understand any bias.

Evaluating Websites

As our world becomes more and more connected by technology, our ability to evaluate and use information has become more difficult, but not impossible. It is essential to understand how these technologies work and how people use them.

Websites, broadly speaking, are perhaps the most difficult sources to evaluate; however, the following tips can act as basic guidelines:

- Consider the URL: generally speaking, .com, .org, .ac.uk, .edu and other more common domains are a bit more likely to have reliable and good content.
- What type of website is it? If it is a blog, social media site, or other tool for personal expression, proceed with caution. Much of the "fake news" problem is driven by sharing questionable material on social media.
- What is the main purpose or claim of the website? Be careful with websites interested in selling downloadable information sources, such as "How to Conduct Research" or "Make Money in Real Estate." The content may be accurate and useful; however, the sheer abundance of poor sources means you should only use these types of data/sources with caution.

PRACTICE QUESTION

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LEARN MORE

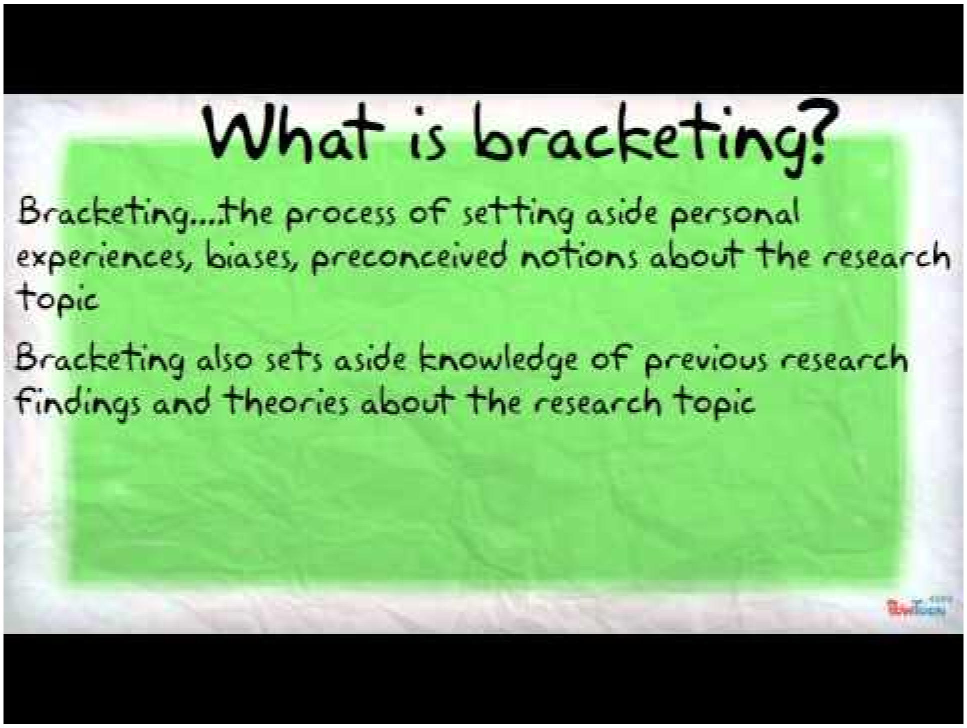
While we've boiled the evaluation of websites down to a few key tips, it is actually a complex topic that could fill books. For more information, check out Mike Caulfield's Web Literacy for Student Fact-Checkers.

This book is (as stated in its own introduction) "an unabashedly practical guide for the student fact-checker. It supplements generic information literacy with the specific web-based techniques that can get you closer to the truth on the web more quickly." (Note: Caulfield, Mike. "Why This Book?" *Web Literacy for Student Fact-Checkers*. Web. 30 June 2018.)

Understanding Bias in Your Sources

A word on bias: some consider bias to be a problem. However, we might argue here that bias is a normal part of life and human interaction. We are all biased by our upbringing, our experiences, and our perspectives. While any attempt to be objective in your analysis is a good thing, it can be just as useful to acknowledge your biases in your research and arm the reader or consumer of your material accordingly. In a way, this is a form of respect to your readership; you acknowledge their critical thinking role in consuming your material and also acknowledge that ruling out all bias—no matter how professional or scientific one's research approach might be—is ultimately impossible.

The following video from Chris Flipp illustrates one way to acknowledge and represent bias. It uses a term called Bracketing, that comes from a qualitative research method/idea known as Phenomenology. Bracketing is the act of reviewing and gaining awareness around your preconceived notions of a given topic before pursuing further study. This awareness should help your evaluation of sources and keep you mentally engaged in the review of your own sentiment towards your data.



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PRACTICE QUESTION

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The following video from Practical Psychology illustrates various biases. Note how these biases could affect your thinking, and consider ways you might apply this awareness to evaluating sources:

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CRAAP Analysis

There are several tools available when evaluating sources. Perhaps the most common and well known is the (well-titled) CRAAP Analysis. The University of Santa Cruz library has a full breakdown of the CRAAP method. Below is a summarized form; CRAAP stands for:

- **Currency:** How current is the source?
- **Reliability:** How important is the information, and has it been consistently presented?
- **Authority:** What is the source of the information?
- **Accuracy:** Judged against other sources (which themselves will need appropriate evaluation), how correct is the source?
- **Purpose:** What is the goal of the source—why was it created?

The following video from Wintec Library also discusses the analysis. Note that the video has no narration.

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Lastly, Flinders University has an excellent commentary below on the use of Wikipedia. Depending on your organizational culture, Wikipedia might be sufficient as a source. This is hotly debated, but it all depends on the purpose of your writing. Not all of your business reports need to be lengthy and high caliber items supported by scholarly sources; you might find yourself writing a “quick” report within a day or two where your boss indicates that Wikipedia or some other introductory website (and encyclopedia maybe) is sufficient. It is important to point out that the report, while important, is not the end, it simply a means to making better decisions. Direction from your organization’s decision-makers is key. Flinder’s comments: (Note: Flinders University. "Evaluating your source." Web. http://flinders.libguides.com/evaluate. 18 June 2018.)

> A note on Wikipedia. While you certainly would not cite a Wikipedia article as a credible source in your essay, Wikipedia can be a great place to start to get an understanding of a topic. It may also lead you to relevant, high quality resources. Try looking at the references for a Wikipedia page (at the bottom of each Wikipedia page) and assess the quality of the references you find. Many Wikipedia entries will cite scholarly resources (including books and journal articles) in their references, which if appropriate, can then be cited in your essay.

THE HUMAN FUND

If we return to Martha’s project, we can imagine her running each secondary source through a CRAAP analysis. Her sources are likely to be a mix of books, magazine articles, videos and other media. When considering what might make for a good source for Martha, we might use a reverse version the CRAAP analysis to illustrate her analysis:

Currency

How current is the source?

Martha is not likely to use anything older than 3 to 5 years. There is no hard-and-fast rule here, but civic politics, dynamic life, technology and other features of human experience are likely to render anything too much older than 5 years less helpful.

Reliability

How important is the information, and has it been consistently presented?

Martha is likely to read or watch materials that are professionally put together and have a linked look and feel to the material.

Authority

What is the source of the information?

Martha is likely to look at sources that have a reputation of doing work in the homeless community or have done good work in other similar areas of social work.

Accuracy

Judged against other sources (which themselves will need appropriate evaluation), how correct is the source?

The bottom line here is whether the material has been reviewed by other experts. For scholarly work, we refer to this as "peer-reviewed." Clearly not all of Martha's sources need to be peer-reviewed; however, the more of her sources that are, the better her information will be. Flinders University recommends asking the following questions: (Note: Ibid.)

- Is it scholarly?
- Is the information supported by evidence?
- Is that evidence referenced by the source?
- Has the content been peer-reviewed or edited by a publisher?
- Can the information be verified by other literature on the same topic?
- Is the tone objective and impartial?
- Is it free from obvious errors such as spelling or grammar?
- Is it written by a scholar with expertise in the field?

Purpose

What is the goal of the source—why was it created?

This is where intention and bias are more clear. For professional scholarly work, you will often see a note at the end of the document indicating any funding or entities that supported the work. This is there to inform the reader of external influences on the material. A professional author will work to limit his or her bias, or they will use an alternative technique, which is to discuss their bias in their work, and make their agenda clear to the reader.

PRACTICE QUESTIONS

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Case Study: News Media Today

News media sources, such as a TV news report, must be carefully scrutinized. Here we refer to news media as major news networks, such as CNN or Fox News, local television news, and other televised news programs. These sources are unfortunately not above the tension and issues possible with less established sources. An April 2018 video criticizing Sinclair Broadcast Group highlights the dubious nature of our contemporary media landscape.

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The following two videos discuss the fallout and tension:

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A YouTube element has been excluded from this version of the text. You can view it online here: https://courses.lumenlearning.com/wmopen-businesscommunicationmgrs/?p=765

Interestingly, the discussion has become deeply politicized. Whether the material presented is conservative or liberal is interesting, but our purpose here is to highlight how media is a contested space; it is just as difficult to get quality information here as anywhere else, and the information presented through media must be scrutinized like any other source.

Evaluation

As with evaluating websites, evaluating other media sources with the CRAAP method is appropriate. There are, however, a few added questions specific to media:

Who owns the outlet?

The above example is about Sinclair Broadcasting Group. Take a look at WebpageFX's infographic of ownership of key outlets. As you view the infographic, consider applying the CRAAP Analysis to WebpageFX. Is it a good source? Why or why not?

Figure 1 shows the consolidation of media ownership in the United States over a 30 year span.With consolidation of outlets, the plurality of available media and variation in beliefs and political stances represented has diminished.

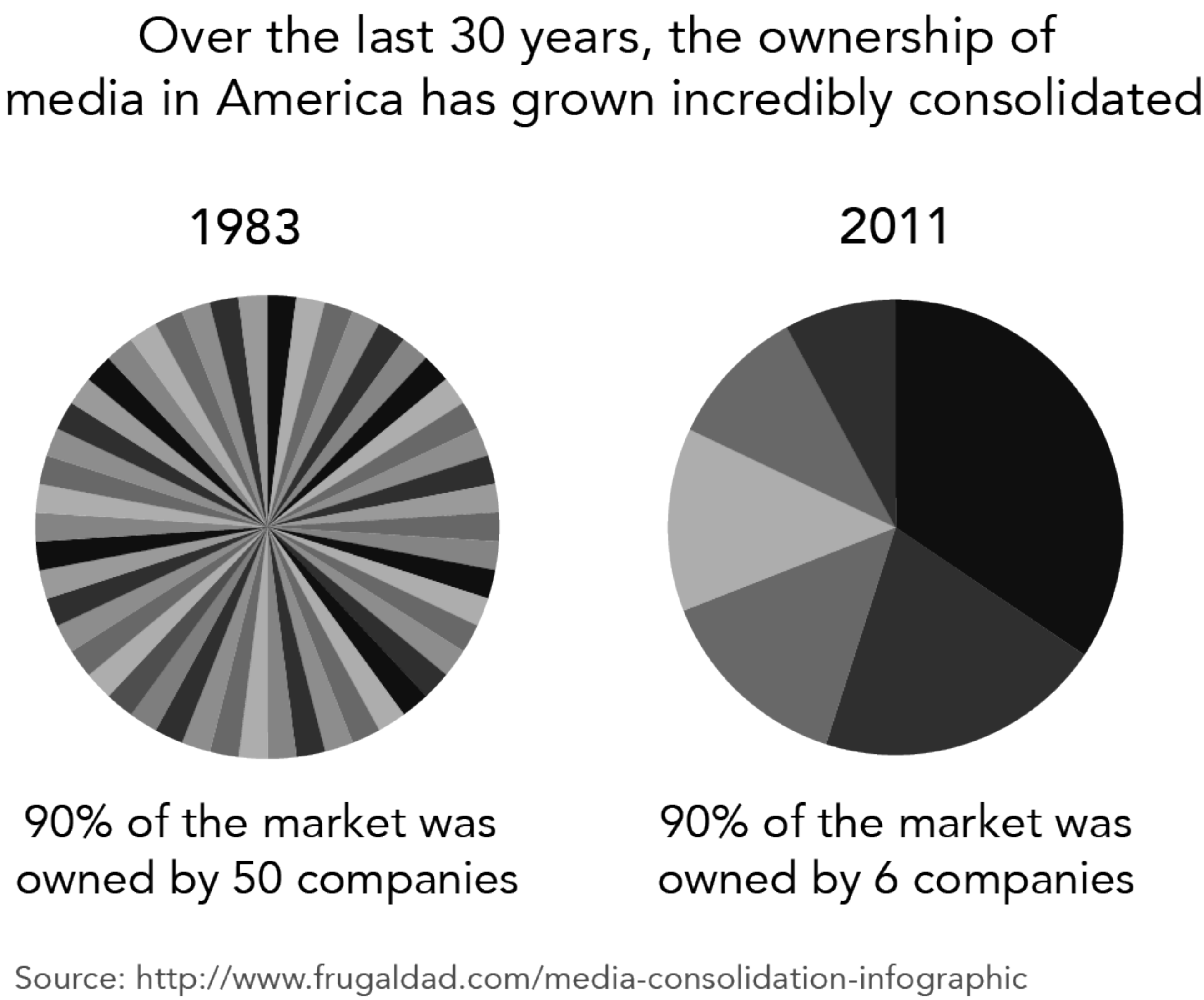

Figure 1. Media consolidation from 1983 to 2011

In plural democracies like the US and other Western nations, this is certainly a concern. To what extent do the media play a role in homogenizing American life? To what extent should we be concerned this affects our freedom and ability to live and exist with others with whom we might disagree, yet arguably should respect?

How long has the media outlet been around?

While not a perfect test of quality by any means, consider how something like *60 Minutes*, the news magazine from CBS, has been on the air for over 40 years. Would this make it more or less reputable than, for example, a newer YouTube news channel, e.g., The Young Turks or The Rubin Report.

In the above discussion, we noted how quickly the use of media becomes politicized. Consider the use of mass media sources carefully given this potential problem. A good technique would be to simply address what you (as the researcher) think the bias might be. As we've discussed elsewhere, it's not as simple as saying all bias is bad, but rather, bias is something we all encounter and have, and it is reasonable and useful to address bias head-on. The researcher should tell the reader what their biases are; the researcher should tell the reader what they think a given source's biases are as well. The onus is on the reader always to think critically on the material presented.

Synthesizing Sources

Using Your Sources

There are three methods for referencing a source in your own text: quoting, paraphrasing, and summarizing.

Quoting

Direct quotations are words and phrases that are taken directly from another source and then used word-for-word in your text. If you incorporate a direct quotation from another author's text, you must put that quotation or phrase in quotation marks to indicate that it is not your language.

When writing direct quotations, you can use the source author's name in the same sentence as the quotation to introduce the quoted text and to indicate the source in which you found the text. You should then include the page number or other relevant information in parentheses at the end of the phrase or use footnotes or end notes to cite the source. (The exact format will depend on the formatting style of your essay).

Paraphrasing

When paraphrasing, you may put any part of a source (such as a phrase, sentence, paragraph, or chapter) into your own words.

You may find that the original source uses language that is more clear, concise, or specific than your own language, in which case you should use a direct quotation, putting quotation marks around those unique words or phrases you don't change. It is common to use a mixture of paraphrased text and quoted words or phrases, as long as the direct quotations are inside of quotation marks. You must still cite the source even if you rephrase their idea in your own words.

Summarizing

Summarizing involves distilling the main idea of a source into a much shorter overview. A summary outlines a source's most important points and general position. When summarizing a source, it is still necessary to use a citation to give credit to the original author. You must reference the author or source in the appropriate citation at the end of the summary.

Integrating Material from Sources

Incorporating sources into your writing uses a general pattern.

- You make a claim or point, e.g., “The Human Fund helps >25% of the downtown Chicago homeless population.”
- You cite evidence, e.g. an MLA or APA citation, by embedding a hyperlink in a digital document, by paraphrasing, or by using a direct quote.
- You segue to another claim or new point.

The relationship between claim and evidence is key; for your writing to be effective, you must back up claims or knowledge with quality evidence (sources).

PRACTICE QUESTION

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Integrating materials from sources into your own text can be tricky; if we consider the metaphor that writing a paper and including sources is a way of facilitating a conversation about a topic, it helps us to think about how this will work best . When you’re discussing a topic in person with one or more people, you will find yourself referring to outside sources: “When I was watching the news, I heard them say that . . . I read in the newspaper that . . . John told me that . . .” These kinds of phrases show instances of using a source in conversation and ways that we automatically shape our sentences to work references to the sources into the flow of conversation.

Think about this next time you try to work a source into a piece of writing: if you were speaking this aloud in conversation, how would you introduce the material to your listeners? What information would you give them in order to help them understand who the author was, and why their view is worth referencing? After giving the information, how would you then link it back to the point you were trying to make? Just as you would do this in a conversation if you found it necessary to reference a newspaper article or television show you saw, you also need to do this in your essays.

WRITING ETHICALLY

What you'll learn to do: Discuss issues of plagiarism, copyright and fair use

Developing a business report or other communication comes with certain responsibilities, namely proper citation of other people's work. There are three common concepts that we will review here; all three have to do with the right author or creator getting credit for his or her efforts:

1. Plagiarism
2. Copyright
3. Fair Use

Plagiarism is using someone's ideas or materials without properly citing their authority. The following eHow Education video discusses the problem:

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Copyright is a concept originating in 17th Century England. Concerned about the unregulated copying of books, the English Parliament passed a law detailing how a copy of a published text needed to be deposited with the government, ostensibly to track and gauge authorship, and then provide due credit. This practice has evolved since obviously, but the same concept applies — that of the governing authority in a given region being charged with regulating authorship and creation of content.

Lastly, Fair Use is a related concept that details how one may use copyrighted or other protected material without citation. There are four conditions, and all four must be met: (Note: Larson, Aaron. "Fair Use Doctrine and Copyright Law". ExpertLaw.com.11 February 2018 Web. 16 April 2018.)

1. the purpose and character of the use, including whether such use is of a commercial nature or is for nonprofit educational purposes
2. the nature of the copyrighted work
3. the amount and substantiality of the portion used in relation to the copyrighted work as a whole
4. the effect of the use upon the potential market for or value of the copyrighted work

In the following pages, we will go into each in greater detail.

LEARNING OUTCOMES

- Discuss the importance of professional integrity in written communication/reports
- Identify guidelines to avoid plagiarism, copyright, or violation of Fair Use Act
- Document and cite sources using the correct style and formatting

Professional Integrity

Consider the earlier discussion on the CRAAP Test for evaluating sources:

1. Currency
2. Relevance
3. Authority
4. Accuracy
5. Purpose

The test and its authors argue that for a source to be useful, it must meet criteria laid out in the above categories. The same concept applies to material you author, and the materials you submit to others in your organization.

For decision-makers or colleagues to trust the reports you write, your professional integrity, and the manner or how you go about doing your work, must be above any concern.

Consider the following ethical violations in recent memory; all of which highlight the role of the individual's behavior: (Note: Shen, Lucinda. "The 10 Biggest Business Scandals of 2017," *Fortune*. 21 Dec 2017. Web. 18 June 2018.)The 10 Biggest Business Scandals of 2017

- Facebook's use of your personal data, and the role of Cambridge Analytica in the 2016 US Presidential election
- Wells Fargo's fake accounts, and over-charging of customers
- Apple's deliberately slowed down iPhones
- Melania Trump's speechwriter's use of Michelle Obama's speech

In viewing the above instances, and thinking on your own role in the development of reports and other information, we can consider the concept of professional integrity to orient our thinking and action. In each of the above cases, individuals, or groups of individuals, knowingly violated reasonable ethical standards and norms. These standards are either codified in law, as is the case around copyright and use of someone's personal data, or what we could consider a common sense standard.

A common sense standard is one about which we could quickly ask ourselves: "Would anyone question the manner in which I'm doing this work or activity?" If the answer is yes, your behavior needs to adjust. In the above cases, it is clear that this did not happen.

The University of St. Andrews describes Professional Integrity, and details the following concepts as central to the idea: (Note: University of St. Andrews. "Professional Integrity." Web. 18 June 2018.)

- The researcher (or business report writer), operates at the highest levels of ethical responsibility. We should take this to mean that you will do everything you can to build reports, and use information in ways that no one would ever question your conduct. Proper citation and use of others' work, care to anonymize sources—especially anyone vulnerable, and safeguarding of data to ensure it is not tampered with, are all germane.

- Operate and conduct yourself within your skillset. This is an interesting concept that can be difficult to think through and maintain in one's action in a busy and competitive organization. St. Andrews' here is describing a sort of intellectual honesty around what you might be qualified or unqualified to do. Bottom line: if someone asks you to do something for which you are not qualified, consider ways to turn down the project, rescope the project, or get help with the areas or pieces that are outside your skillset.

PRACTICE QUESTION

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Avoiding Plagiarism

As discussed in the previous page, incidents of plagiarism and related ethical violations are unfortunately common features of contemporary life, both in and out of our work environments. The video below from 2016 describes 10 famous cases:

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PRACTICE QUESTION

Both intentional and unintentional plagiarism are problems, and you should do everything you can to keep them from happening. It is obvious that intentional plagiarism would be a gross violation; however, unintentional plagiarism is a bit more difficult to nail down.

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As the UNSW Sydney's page for their current students describes, "most incidents of plagiarism are the product not of deliberate cheating, but of underdeveloped academic skills." (Note: UNSW Sydney. "How Does Plagiarism Happen?" Web. 18 June 2018.) Often the problem isn't with the ethical standing of the author but with something else, such as lack of time, lack of clear notes, and lack of understanding of proper referencing. Thus, the basic rule of thumb for avoiding plagiarism is three-fold:

- If you even suspect the idea is someone else's, take the time to go back through notes, Google, or other reputable sources, and search for the author.
- Allow enough time to build your reports.
- If you are not sure of authorship, consider using other evidence or sources to articulate your idea.

There are, however, a very few things that don't require attributions: scientific or mathematical equations and "common knowledge." You don't have to provide a citation if you include the equation $E = mc^2$, but you do need to attribute a quote that explains the history of the equation's discovery. You don't have to provide a citation if you include the fact that gravity exists, but you do need to provide a citation for a study that discusses how gravity impacts astronauts on the ISS.

PRACTICE QUESTION

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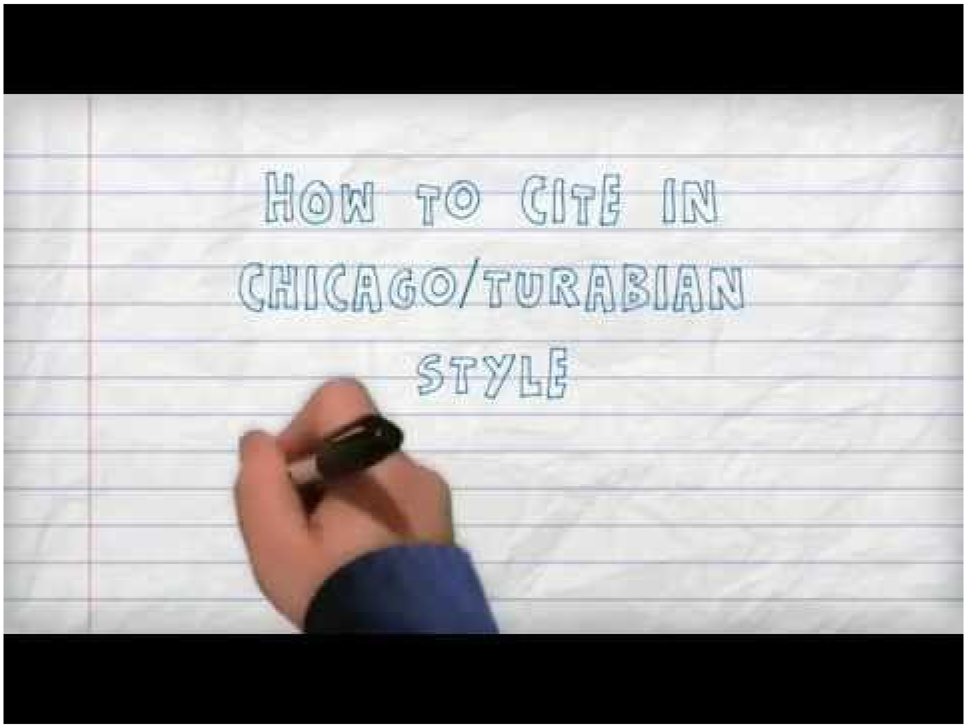
Documenting and Citing Sources

Proper citation of sources is essential to avoiding plagiarism or copyright violations. The following video from Conestoga College Library Resource Centre discusses the Turabian Chicago Style found in the *Chicago Manual of Style*. You can find more detail about the *Chicago Manual of Style* online or purchase a printed copy, now on its 17th edition.



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There is however something pertinent to the business world that we should consider: there is a common tension between Academic/University environments, and the often-labeled, “Real World.” While academic writing clearly requires proper citation in accordance with generally agreed upon rules, business writing might not need to be so precise. The spirit of attribution however, and not taking credit for someone else’s work, is still obviously at play. Consider your audience, the time available, and the purpose of the communication when making a decision about style and formatting of citations.

Style and visual considerations are often important for business writing as well. Consider this McKinsey Global Institute report. On page 11 of the report, we can find one simple reference. So as not to visually distract the reader, the authors use a footnote. This is appropriate for a glossy high dollar report, for which McKinsey and other powerful consulting houses are well known. On page 12 of the report, an infographic with extensive quantifiable data, provides source material towards the bottom of the table in a very muted and small font. This is reasonable for the type of document at hand, and could provide you with insight into citation style for your reports.

The key here is proper attribution, and doing it in a manner that conforms with the visual and general use of your sources. The closer to academic or think-tank like work you are, the more precise and formal it needs to be; if, however, you worked for something like a startup or a smaller company, overly formal and precise citation could actually be distracting and cumbersome. Use your best judgement.

PRACTICE QUESTION

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PUTTING IT TOGETHER: RESEARCH PROCESS

In this module, we've discussed how research plays an integral role in business communication and set up to do this kind of work in your own organization. It's a useful skill!

Business communication done well requires thoughtful planning and carefully crafted media. Your communications over email, social media, and all other methods all stem from a firm foundation in quality information. Doing research properly gives you that foundation; we may argue that research is tool to engage and think about a given problem.

As you considered the role of research in business communication, we invited you to ask yourself the following introspective questions:

1. How important is it to use reliable and factual sources and data when communicating in business?
2. What is your audience? Do they require formal citation, or other forms of attribution and credit?
3. How does one evaluate a source? How do you know if something is any good or not?

So, what are your final thoughts on report writing? Hopefully you're feeling good about your learning, and are set up for success in the conduct of research.

MODULE 5: VISUAL MEDIA

WHY IT MATTERS: VISUAL MEDIA

Our prehistoric ancestors struggled, rock in hand, to carve just the right picture into the wall of the cave, hoping that someone would come along and understand the story being told. They may have drawn stick figures with spears, a woolly mammoth in the distance about to become dinner. In the next series of drawings, the mammoth has been struck, the stick figure looming over him. In a third series, a gathering of stick figures at a fire, presented with a feast.

There is beauty and clarity in the simplicity of the prehistoric man's drawings. You understand his hunting victory even though he's used no words. Prehistoric man was on to something with this approach.

Fast forward to today where studies have been done on the impact of visual aids:

- Only 70 percent of people reading labels on medicine containers understand the instructions when they are written in text form, but that understanding increases to 95 percent when the text is accompanied by images. (Note: Dowse, R. & Ehlers, M. (2005). Medicine labels incorporating pictograms: Do they influence understanding and adherence?, Patient Education and Counseling, Vol 58, Issue 1.)
- People follow written directions 323 percent better when the images accompany the instructions. (Note: Levie, W. J. & Lentz, R. (1982). Effects of text illustrations: A review of research, Educational Communication and Technology.)

From this, we know that visual media can make your communication easier to understand. But does it help you make a point or sell an idea? When listening to an oral presentation, 50 percent of an audience will be persuaded by the speech alone, but that number increases to 67 percent when the speech features visual aids. (Note: Wharton School of Business. 'Effectiveness of Visual Language'.)

Because of this, we know that visual media can make your communication more convincing. In an age in which we humans are asked to process more information than we have ever processed before, let's look at today's trends:

- People are 80 percent more likely to engage with content when it features color visuals. (Note: Green, R. (1989). The Persuasive Properties of Color, Marketing Communications.)
- Facebook audiences are 651 percent more likely to engage with a post if it includes an image, compared with posts that don't. (Note: Social Intelligence Report, Adobe Digital Index Q4 2013)

This shows us that visuals attract attention and draw our audiences in. Visuals make our communication noticeable.

Communications are more memorable, persuasive and easily understood when visual media is involved. Like prehistoric man, we can use visual media to more effectively deliver a message. In this module, we're going to talk about the uses of various visual media—charts, graphs, images, and even video—and how communicators can leverage them to connect with their colleagues and other professionals.

MEDIA AND YOUR MESSAGE

What you'll learn to do: Find the best media to present your message

> I hear and I forget. I see and I understand. I do and I remember.
>
> —Confucius

Confucius had the essence of business communication defined back in 500 BC. Your organization is full of people who hear and forget; however, if they see, they will understand.

Visual media improves a business communicator's chances of being understood by presenting information with a unique combination of logic and creativity. In this section, we will learn what visual media resources are available to business communicators and how to choose those that will strengthen your messages. We will learn about basic visual design principles and the messages that these principles send to your audience.

LEARNING OUTCOME

- Describe professional standards for using visual media resources for business purposes
- Describe basic visual design principles

Using Visual Media Resources

As we learned in Module 1: Communicating in Business, in all business communications, we should have:

- Clarity
- Conciseness

- Objectivity
- Consistency
- Completeness
- Relevancy
- Understanding of audience knowledge

If you keep these seven communication principles in mind when you're crafting your message, you improve the chances that your message will be effective. Now we are going to add visual media to our communication toolbox; visual media increases your message's impact.

How does a visual element give your message more impact? Think about the last time you asked directions to a friend's house. If you are one of those "direction-impaired" people whose eyes glaze over at the first "go north" or "head east," then you know how helpful it is when someone draws you a map. It's a simple visual aid that takes the place of all of those words you're not quite sure what to do with. That map has made your friend's communication of directions easier to remember. There are examples of this all around you. The word "STOP" is a fairly easy word, but a red light or octagonal sign removes the need of any words at all. The weather report shows you a rain cloud, and you grab your umbrella without a second thought.

If your message can be more clearly understood by incorporating visual media, then by all means, you should do it. And to incorporate visuals effectively, you should understand that you're going to heed all seven principles of communication, particularly these:

- **Clarity:** your visuals should be clear, clean, and simple
- **Consistency:** your visuals should all maintain a uniform look and feel
- **Relevancy:** your visuals should make sense as a part of the whole communication and be on-brand

And then we're going to add a whole new principle to the mix, that your visuals should be **persuasive**: your visuals should inspire an emotional bond or a new level of understanding.

Let's look at each one of these principles separately.

Clarity

When considering the use of visual media, make sure that it's easy for the reader to glean the information he needs. Some general rules we'll keep in mind as we go through this module include,

- **Use bold, contrasting colors.** If you have a pie chart or a graph, it helps to make one piece red, another yellow, and yet another blue. This makes the chart easier to read than if each piece is a different shade of green. Make sure your chart pops with color, and there will be no question which piece is which.
- **Use easy-to-read fonts.** Loopy letters and heavy calligraphy strokes slow your reader down. Choose a font that's easy to read, like one of the many discussed by author John Wood in his blog for the American Writers & Artists, Inc. website.
- **Use only pertinent information.** If the point of your communication is to show that sales have gone up 22 percent over last year, your graph should feature that information—and nothing else. If you throw expenses, employee turnover and gross margin on that same chart, your reader will miss your message. Point out the information you need to highlight, and let everything else fade into the background.

Consistency

This module on visual media looks a lot like the other modules in this business communication course, doesn't it? Same kind of headers, same colors. Uniformity helps the reader understand what to expect and better prepares them to take in your message. Here are a few things we'll try to do in this module as we study different types of visual media:

- **Stick to the format of your charts and graphs wherever you're able.** If you start out with that bar chart showing annual sales, don't make it a line graph in the next section and a stacked bar chart in the section after that. Using different charts to show the same information slows your reader down unnecessarily. Keep in mind that if you found the best visual scheme to explain the data in the first place, there's no reason to change it to a less-effective one just for the sake of variety.

- **Stick to the color scheme and fonts you've already established.** If you show sales on your graphs in red, always show them in red. If you've chosen one easy-to-read font for all your tables, or a similar style of photo for all the sections of your annual report, there's no need to deviate.
- **Use pictures that are visually similar.** If you're using a series of head shots, the heads should all be about the same size. If four of the pictures show a person's head and shoulders, the fifth one should not be showing a person from the waist up.

Relevancy

If your message is communicating annual sales, your charts and graphs shouldn't be dealing with employee turnover rates. If your message is about your company's efforts to reduce waste, that message should not feature a photo of a cute puppy. That's relevancy at a very basic level.

Keeping communication "on brand" takes relevancy to a whole new level. Companies rely on visual media as much as the written word to deliver their brand message, and as a communicator, you need to keep your choices in visual media relevant to your company's mission and promise to its customers.

COLORS IN BRANDING: TARGET AND DISNEY

If you ever visit Target's website, you may notice there's a whole lot of red. That didn't happen by accident. Target has a series of colors and images that coincide with the way they identify themselves as a company and the promises they make to their customers. You see a lot of crisp clean backgrounds with vivid pictures showing style and value—and a lot of red fonts and bulls eyes.

Conversely, Disney's main color is blue, but Sleeping Beauty's castle and that cartoon mouse are even more closely associated with the company's mission and promise to customers. Disney photos always depict happy families interacting with characters and enjoying the entertainment.

Large companies usually have a set of brand guidelines or a brand "style guide" that communicators can consult to familiarize themselves with the company's preferred color palette, fonts and image standards. All of your business communications represent an opportunity to reinforce and reflect your company's brand, and it's your duty as a communicator to do so.

Persuasive

Your visual media choice should help you tell your story. Even if your data is perfect, it's no guarantee your audience is going to jump on board with you. Your use of image, chart, or video should indicate it is from a reliable source, be simple to read, and allow you to show the audience exactly how you drew the conclusion you've drawn. If you're communicating in aid of a cause, it doesn't hurt to choose an image that invokes a little emotion.

This doesn't mean that you should sacrifice the principle of objectivity when you employ persuasiveness in your visual media. But your communication strategy on the whole is an engagement tool, and your choice of visuals should strengthen that engagement.

PRACTICE QUESTION

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Visual Design Principles

LEARNING OUTCOME

- Describe basic visual design principles

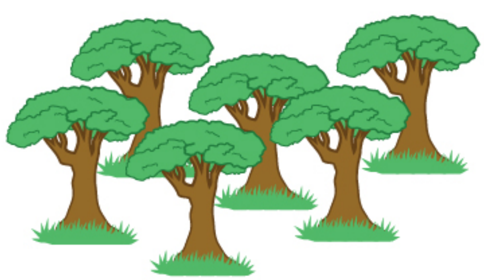
Business communicators don't always have access to a graphic artist. In the event that you as communicator find yourself needing to create visuals that dazzle without the help of a graphic artist, here are a few basic principles of visual design you can keep in your back pocket.

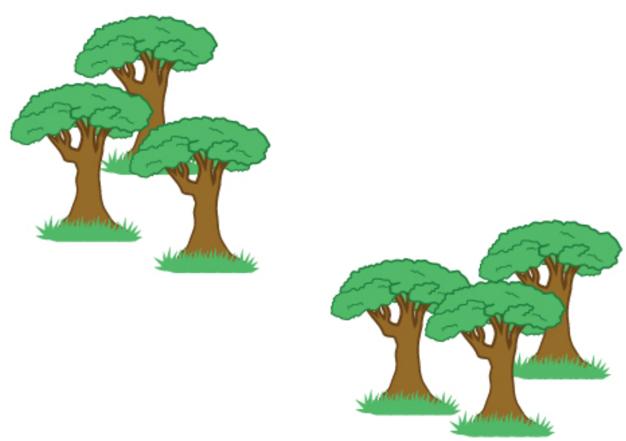
Contrast

Contrast is when two aspects of an image are strikingly different from one another, like dark and light. Contrast is an important principle in visual design and helps highlight the important part of the image. It adds "weight" to your design and guides the viewer's eye to what you want them to see.

Alignment

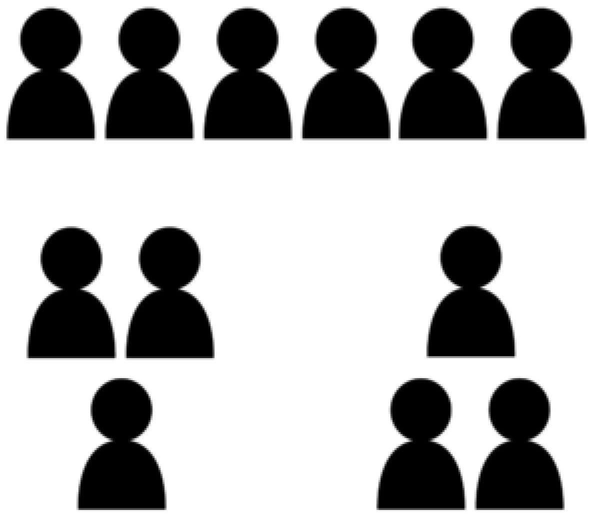
Alignment creates a sharp, linear order to the elements of your visual, so they all have a connection to each other. If objects are closer together, the viewer assumes that they're related. In the first image of trees below, we see six trees that are in two rows even though they're not precisely linear. In the second image, we perceive two groups of three.





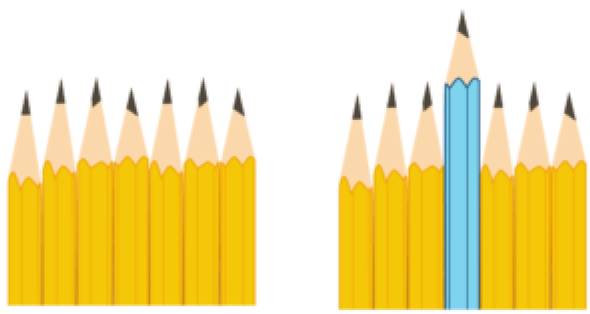
Hierarchy

If there are multiple elements in a design, more visual "weight" should be given to the most important part of the graphic. Establish the most essential part of the graphic first, and then fill in the rest with the less important parts.



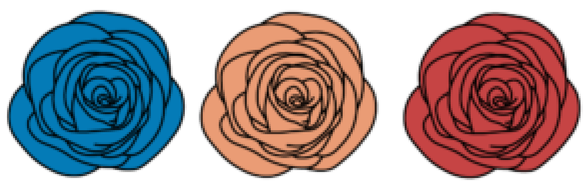
Repetition and Pattern

Repetition strengthens the overall design and ties together elements to make them more consistent. This technique is often used in branding to make items more recognizable.



Color

Color is an important choice in visual communication because each color has a meaning. If you're following brand guidelines, your colors will reinforce your brand, but if not, you might want to consider some of the universal associations that go along with each color. Green tends to conjure images of the environment, while red symbolizes anger, and yellow, happiness. Which of these roses looks cold to you?



Xerox dug deep into why color is important in communication. Check out their two-page cheat sheet to learn more about how to leverage color for the best effect in your presentation.

Balance and Space

Keeping the elements of your design balanced gives the design some form and stability. Even spacing makes it look professional and attractive, but that doesn't mean it needs to be symmetrical. It can be asymmetrical, with larger items in the upper left corner balancing out smaller ones in the lower right, and so on.

Leaving open or "negative" space ensures that your visual isn't cluttered and can highlight the important parts of a design. As we mentioned in our adopted standards above, simplicity is your friend!

Font

Design doesn't stop at the picture. Fonts have everything to do with your audience's engagement with your communication. Take a look at this font and decide if it's easy to read:

The quick brown fox jumps over the lazy dog

You can tell what it says; however, reading this font for too long could get taxing, especially on a screen. Is this next font easier to read?

The quick brown fox jumps over the lazy dog

Your audience won't continue to read your communication if you've chosen a font that's difficult to read.

In addition to legibility, there's a question of style. How do you feel about these lines of text and how they work together?

They're just words, but they're very visual; the use of color and different fonts draws your attention to the words "dream it" and "do it."

WATCH IT

Graphic artists use a variety of rules to choose fonts and lay them out in a graphic design. This video shows you—very visually—how graphic artists make fonts work as a component of visual media.

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Business communicators aren't necessarily graphic artists, but a good command of a graphic designer's visual design techniques will help you evaluate your visual media and decide if it's going to support your message. These aren't all the visual design principles a graphic designer employs, of course, but for our purposes, they're a good place to start.

ADDITIONAL RESOURCES

- Visual Design Principles by Joel Marsh
- Beginning Graphic Design: Fundamentals of Design from Goodwill Community Foundation, Inc.

PRACTICE QUESTION

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IMAGES

What you'll learn to do: Discuss how to most effectively use images in business messages and identify potential sources for these images

We've already looked at compelling evidence that visual media helps your audience better understand your message. Visual media can help you capture your audience's attention and even persuade them to understand your point of view. So let's use some visual media!

Before we jump right in, we want to learn how to use visual media correctly. In this section, we'll discuss images—that is photos, drawings, and other multimedia pictures—and how they are best incorporated into your communications. We'll use our visual communication plans to put those images to work for us and get the best results. And then we'll talk about some resources to find images for your communication projects.

LEARNING OUTCOME

- Identify types of images used for business messages
- Describe how to determine when to use an image and when to use text
- Discuss how to legally source images for your communications

Images Overview

When creating a message take a moment to you ask yourself, "Would including an image strengthen or support the message more than text alone?" Studies show that content that includes images get up to 94% more views than content without images. Users are 40 times more likely to share visual content on social media, and consumers are 80% more likely to read a piece of content if it contains colorful visuals. (Note: Desmarais, Ellen. "Make Your Content Engagement Skyrocket." *Contently*. 21 Mar 2018. Web. 28 Jun 2018.)

In short, visual images can greatly increase the comprehensibility and understandably of a message.

But how do you choose the right picture to match your content? We should apply the visual media standards we discussed earlier:

- The image should be clear and simple
- The image should have the same look and feel as the other images in the document
- The image should persuade the reader (or at least capture some feeling)
- The image should fit with your company's brand.

PRACTICE QUESTION

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Let's take a look at each of these by checking out the websites of some companies you're familiar with.

Clear and Simple Images

A company that has a clear and strong visual identity is Apple. Apple is a technology company committed to bringing the best computing experiences to its customers. The clear, clean look of their website conveys a message to the customer: Our technology is sleek, bold, easy to use.

Figure 1. Apple's iPhone X website

The iPhone X promotional website screen (Figure 1) features an eye-catching smear of colors, something that draws the viewer's attention but doesn't compete with the product itself. Imagine if the iPhone X screen featured a photo of a child, or a cute pet. Would you be looking at the product then, or the content on the phone? Clean and simple images help you convey a singular idea.

Conversely, Figure 2 shows a website that sells new and gently used electronics. Considering this company is trying to sell multiple types of products on one platform, what type of impact factor does it have? How would you compare the impact of this website to Figure 1?

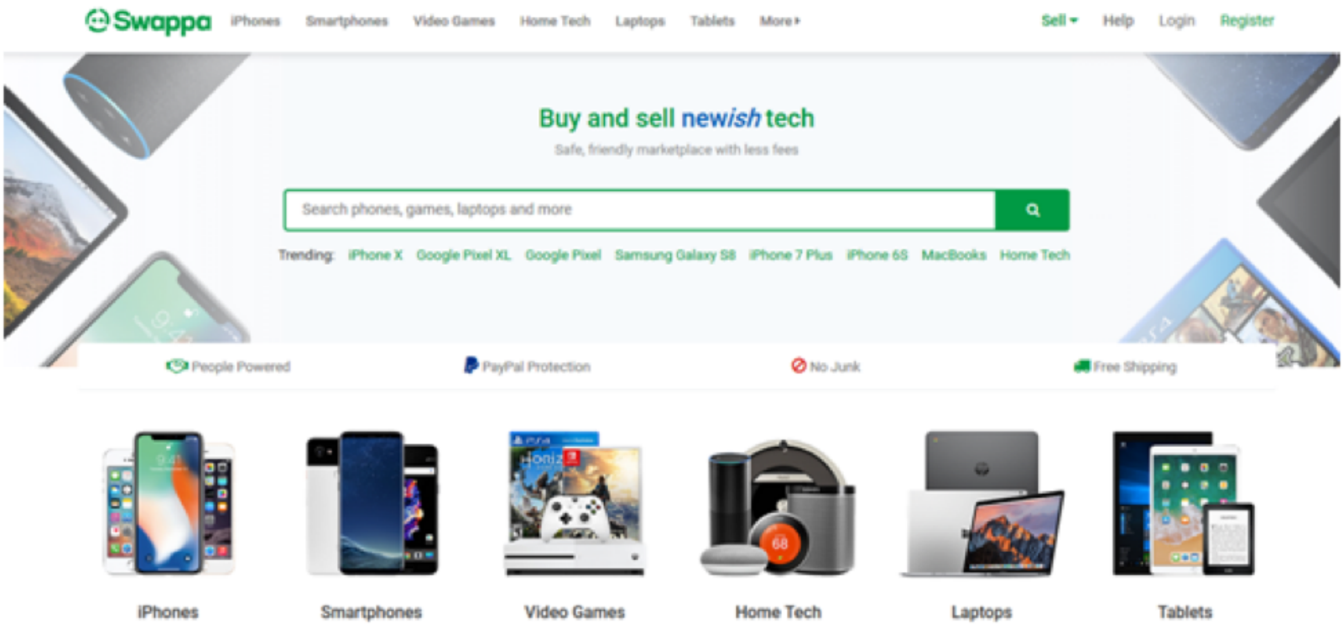

Figure 2. Swappa's website

Uniform Images

Chrysler is an automobile maker founded on the principle of "design with purpose," and their mission is to build cars people will enjoy driving and want to buy again. Figure 3 shows a screenshot of the homepage of Chrysler's website; here the company is using the layout and composition of the images to showcase a wide selection of items to explore here—all while doing it in a way that's interesting to the eye. In the top row we have three of their top-selling vehicles, shown in a uniform format: all shot in the light of the afternoon from about the same distance, all of them positioned at an angle with the front of the car pointing to the right, all of them suggesting the car is in motion.

The next row features two of their vehicles in the center of human interaction – one with a dog and one with other humans, and a black box beneath each to frame written content. Note that the third box is uniform in that it's a black box for text, but it instead features they Kelly's Blue Book logo. A break in the pattern! Did you notice that box first?

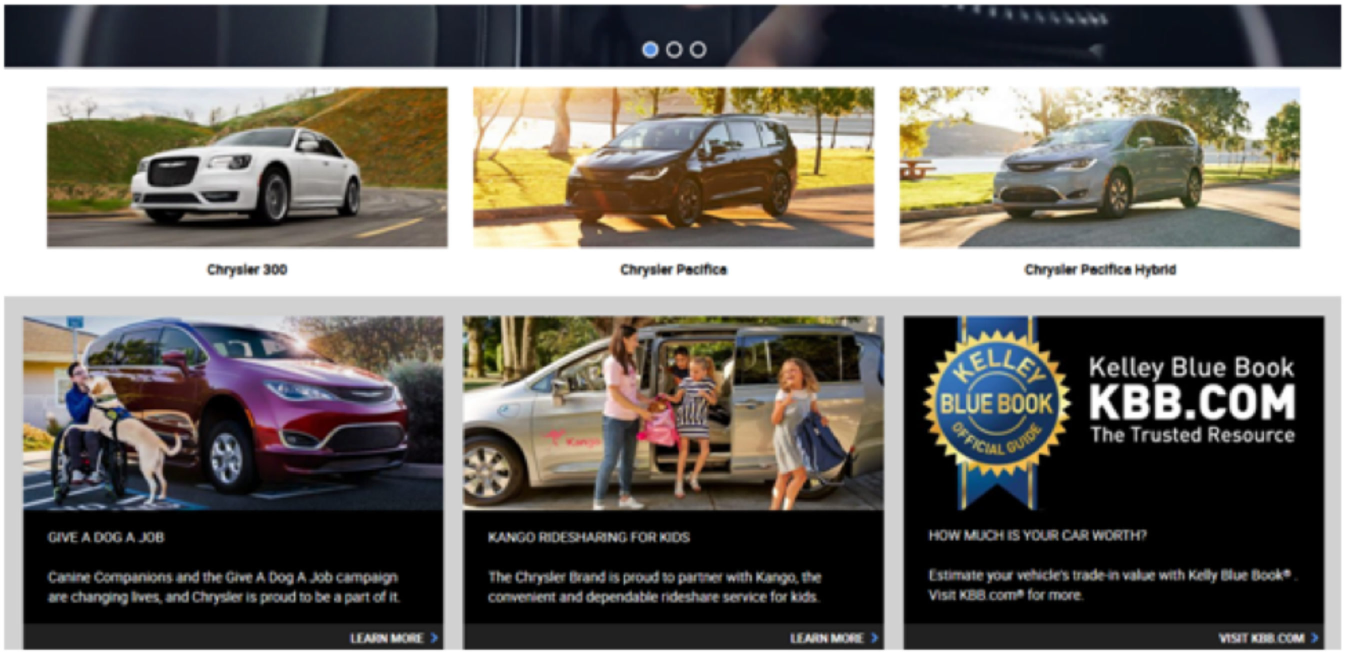

Figure 3. Chrysler's website

Figure 3 is actually the bottom of Chrysler's webpage, and the black also adds that "weight" to the design, drawing the viewers' eyes down to the bottom of the page, adding some insurance that they'll read the whole page. If the images in Figure 3 weren't essentially "alike" it's likely the viewer would avoid looking that far. If you're using multiple images in your communication, take the time to make sure they're visually similar.

Now let's take a look at a website that doesn't use similar images or uniform layout on its front page (Figure 4). How does the visual representation of products impact your desire to purchase a product from the company? In Figure 4, no two images are alike, and the audience doesn't really know where to look—not a very successful use of images.

Figure 4. Arngren.net's website

Persuasive Images

As a nonprofit organization, UNICEF relies on donations to work towards their mission of ending preventable child deaths. This puts them in a unique position where their main business messages must be persuasive enough to inspire people to donate money to supporting their quest. In UNICEF's main homepage (Figure 5) the viewer is presented with a compelling image. Here you have have four young children depicted as happy little kids, just as they should be. The message this image is trying to project is that donor's money put to good use and that by supporting this organization UNICEF creates results.

Figure 5. Unicef's homepage

Other design elements to note are the colors on their site (Figure 5). The entire photo, with the exception of the children, the image has been digitally altered so that the building has been re-tinted blue. The altered image now aligns with the colors associated with the UNICEF brand. The brand color is then contrasted by the children's bright yellow raincoats. Not only do the yellow raincoats stand out and catch your eye, but the color yellow is most associated with happiness. The effects of color on an image can have a large impact on how a brand, or image connected to a message, is perceived by viewers.

Now look at the homepage from another nonprofit organization—Ferndale Cat Shelter website (Figure 6). Take a close look at the main image from their homepage and think about what underlying message the image is trying to convey and which emotions is it trying to evoke.

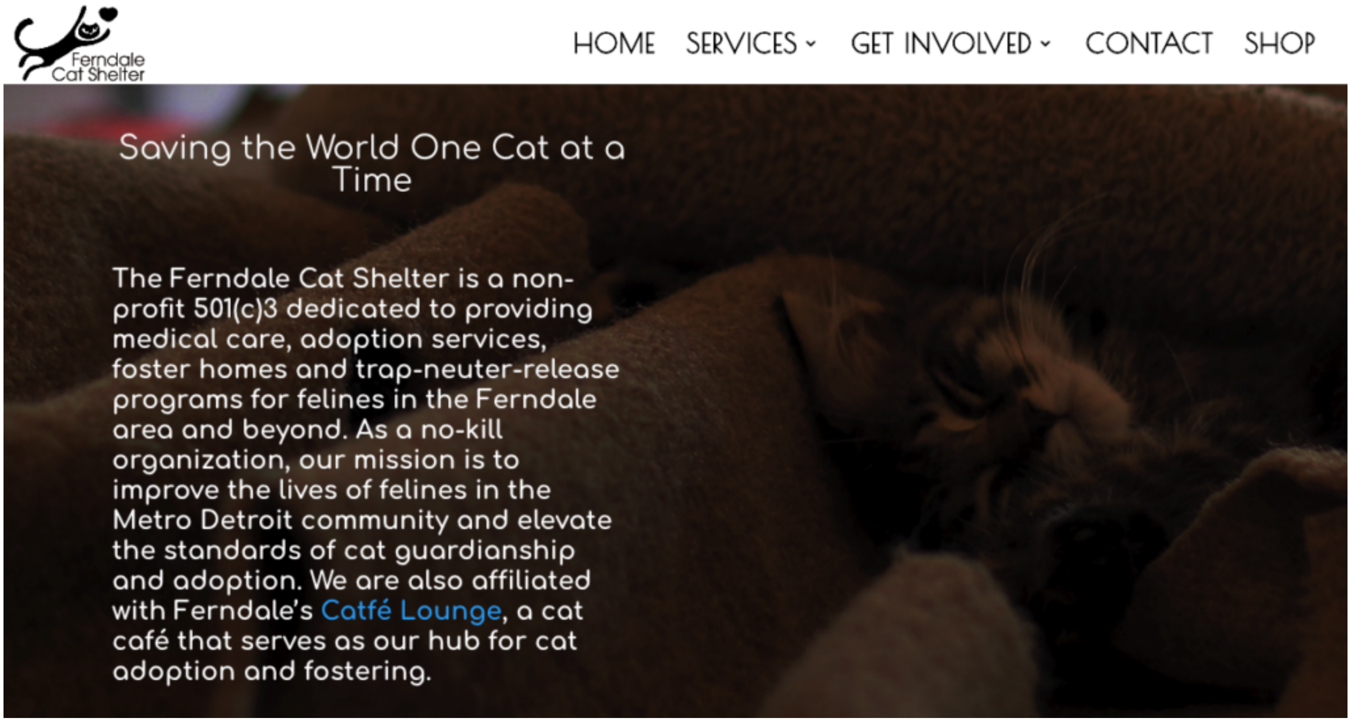

Figure 6. Ferndale Cat Shelter's website

In Figure 6, you see the image of a cat looking sleepy and content against a brown blanket. Due to the darker or shadowed nature of the photo it makes the viewer struggle to connect a message to the image and can make it difficult to feel a particular emotion towards the felines at the shelter. While you might have difficulty seeing the cat, the overall monochromatic use of brown and tan presents a stable, comfortable, or safe space for rescued cats. With a different image or use different colors or tones to make the subject of the photo stand out this non-profit could have made a stronger visual image to project their message and persuade the audience to offer their monetary support.

On Brand Images

"What brown can do for you?" That's the retired slogan United Parcel Service (UPS) used to show its customers that their company can solve client's shipping problems. The current slogan, "We (heart) logistics," similar to the "What brown can do for you?" slogan still needs something more doesn't it? In fact, it requires visual media to support their message.

On the homepage of UPS United Sates' website (Figure 7), the top of the page is headed with their logo and that trademark UPS brown. The image they've chosen is a clean and simple photo of two people in a "small business" situation. One is reviewing the contents of a box, perhaps getting some items ready to ship. The other is at the computer, perhaps checking shipping rates right here on the UPS website. The composition of the photo is a complimentary brown, with stand-out colors in the subjects' clothing that match UPS's secondary color palette. The background of the photo suggests a small business, but it's out of focus so your attention is drawn to the two individuals and their activities.

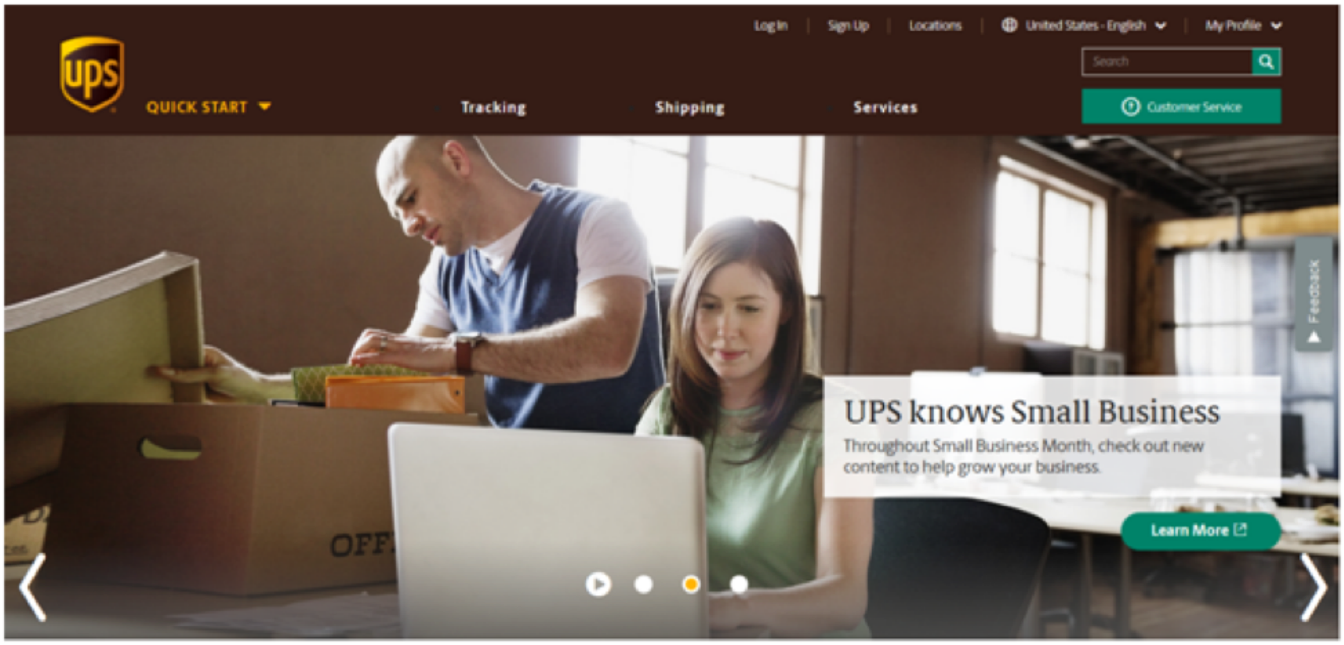

Figure 7. UPS's homepage

This could be considered a successful representation of the UPS brand. The image suggests that UPS is supporting the work of a small business. The image is composed of all the right colors so it's not distracting and supports the overall brand idea. This image is saying, "This is what brown can do for you."

On the other hand, take a look at a website for a children's juice manufacturer Penny Juice (Figure 8). Upon first impression this homepage does not convey any clear message about its brand promise or what the company stands for:

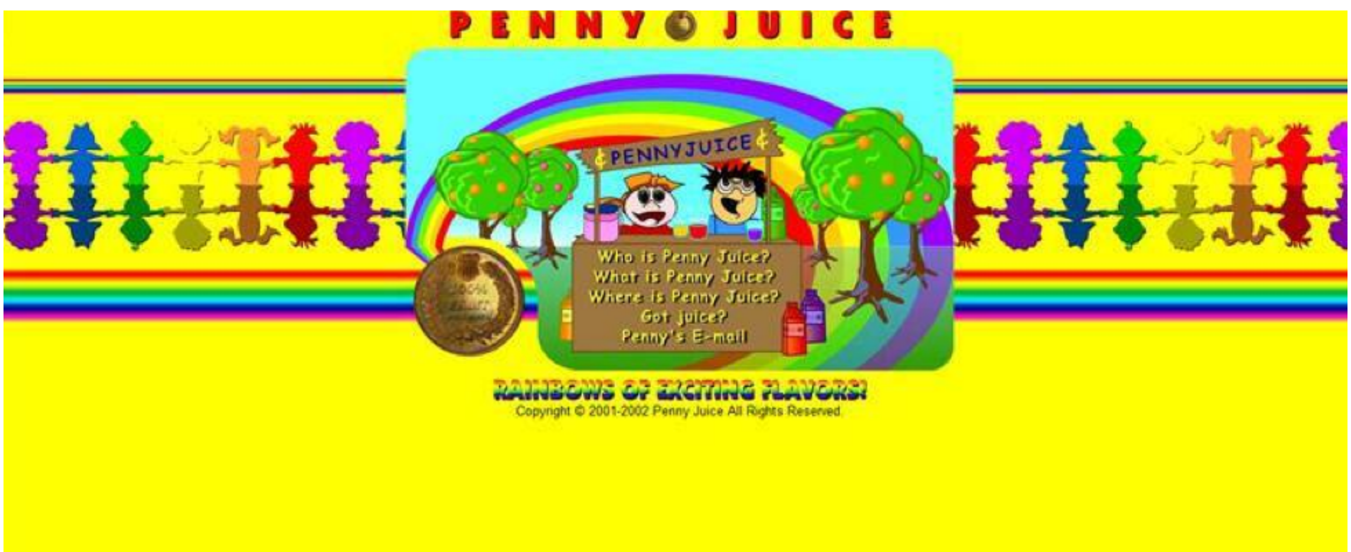

Figure 8. Penny Juice's website

In fact, the cartoon figures and garish use of colors might lead the audience to have a difficult time identifying the product. As a viewer you might have ideas or suggestions for how to convey the message of "We sell juice for kids!" in a more effective manner. Possibly a cartoon of a smiling child drinking a sippy cup full of juice or images of fruit would be a better hint. This current visual does not efficiently communicate brand.

When you measure your images against the visual media standards we put in place in section one of this module, you increase the chance that your message will be effective.

Using Images for Impact

If a picture were really worth a thousand words, the issue of image versus text would be easily decided: use an image. That's a thousand less words you have to write. Yet in the real world, the winner of "image versus text" isn't as easy to determine. Both play a vital role in your communication efforts.

When to Use an Image

Use an image if the information is presented verbally. Are you preparing a PowerPoint presentation for a speaker? If so, you'll want to stick with mostly images in your presentation. While you always want the audience to listen to the speaker, images actually help drive home the point the speaker makes and increases the memorability of that point as well. Therefore, you should use images that support the subject matter. Steve Jobs was famous for his image-based presentations. Most TED Talk speakers follow Steve Jobs's speaking style with regard to visuals.

Use an image if the information is complicated and can be better explained in a visual format. You may be charged with explaining the difference between nuclear fission and nuclear fusion. You can prepare an enormous amount of text to review the process of each and hope that your audience understands, or you can reduce the text and use the photo in Figure 1.

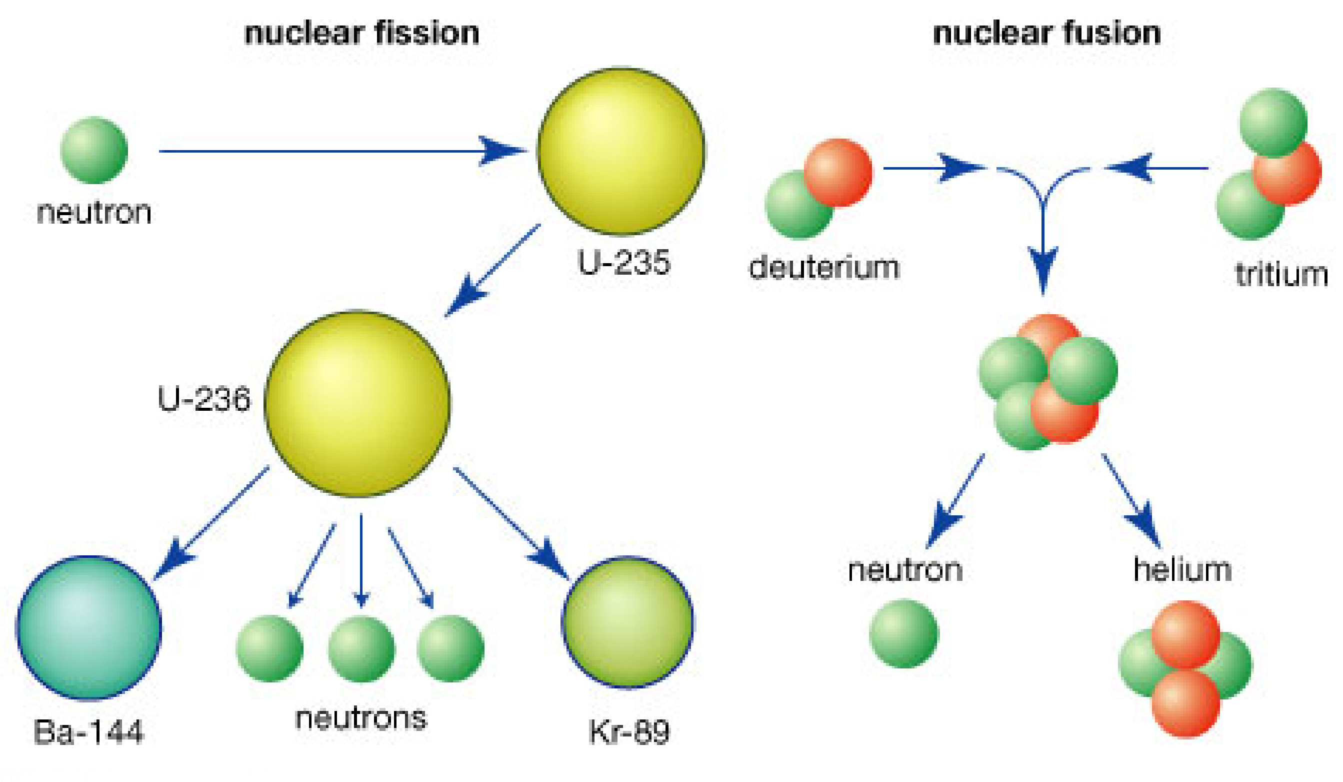

Figure 1. Nuclear fission compared to nuclear fusion

Use an image when it conveys something words just cannot. You may try to describe the northern lights to your reader, but he won't truly understand the beauty of the *aurora borealis* until he sees it for himself. Images can also convey the emotion of a situation in ways words often can't. For example, you can tell people to adopt shelter dogs, but a sweet puppy face looking out beseechingly from a cage will grab people's emotional attention in a way the idea on its own can't.

When to Use Text

Use text when you want to make a powerful point. If you want to leave your audience with a thought like "When the whole world is silent, even one voice becomes powerful." (Malala Yousafzai), using text has far more impact than just showing a picture.

Use text when you're creating a list or a mnemonic. Is your company a fan of SMART (Specific, Measurable, Achievable, Relevant, and Timely) goals, or do they employ the STAR (Situation, Task, Action, Result) candidate interview technique? It's difficult to even discuss these without text.

Use text when an image just isn't enough. And that's a lot of the time! Prehistoric man used images to tell his story on the walls of caves, but words were invented for a reason, and that reason is that images can be limiting. Complex processes may be better served by a simplifying image, but in just about every other instance, complexity is better served with words.

PRACTICE QUESTION

An interactive or media element has been excluded from this version of the text. You can view it online here: https://courses.lumenlearning.com/wmopen-businesscommunicationmgrs/?p=4661

Using Images Legally

All of the images you see on the internet are someone's property, and if you copy them and paste them into your communication, you're most likely stealing (unless the images are royalty-free or free, as we'll discuss below). Additionally, the Fair Use Act makes it okay to use an image "for purposes such as criticism, comment, news reporting, teaching (including multiple copies for classroom use), scholarship, or research…." If your work falls into one of those categories, you're safe. Otherwise, your use of the image is considered a violation of copyright law.

PRACTICE QUESTION

An interactive or media element has been excluded from this version of the text. You can view it online here: https://courses.lumenlearning.com/wmopen-businesscommunicationmgrs/?p=4661

Royalty-Free Images

Luckily, there are royalty-free sources of images, videos, and other visual media out there. (A royalty is a payment made to the copyright owner for each use that doesn't fall under the Fair Use law.) A word of caution: "royalty-free" doesn't necessarily mean "free." On the contrary, sites like Getty Images or Shutterstock often charge licensing fees and even instructions by which you give the original artist credit for his or her work. But once that transaction is complete, the visual media is yours to use as you wish. There's no need to pay royalties for copies sold or time of use.

Open Images

There are plenty of free sources out there, though. Some authors and artists have "released" their works under an open license. This means their works are free to use, modify, and share.

Many of them work with a Creative Commons license. Creative Commons is a US not-for-profit organization that's devoted to expanding the range of creative works available to the general public, and it does so by providing copyright licenses to creators allowing them to express which rights they want to reserve and which they waive. These licenses replace individual negotiations between artist and user. In many cases, images covered by the Creative Commons license can be used free of charge if you simply credit the artist. This might mean captioning your photo with "Joe Photographer/Getty Images" or "Credit: Joe Photographer." You can learn more about the different Creative Commons Licenses on their site.

All of the images and text in this course are licensed under a Creative Commons license. You can check out the "Licenses and Attributions" link on any page of this course to see examples of proper attribution of Creative Commons works.

Figure 1. Example of attributing an author's work

Finding Open Images

- Pixabay:There are over a million free stock photos to choose from on this site, all high quality and high resolution.
- Unsplash:This site has a great selection of business photos to choose from. This website has the option of signing up for an email service to get ten free photos in your inbox every ten days.
- Flickr:There's a section of free use photos here as well, about 415 million of them under the Creative Common license. You simply need to filter your Flickr search by license (Figure 2).

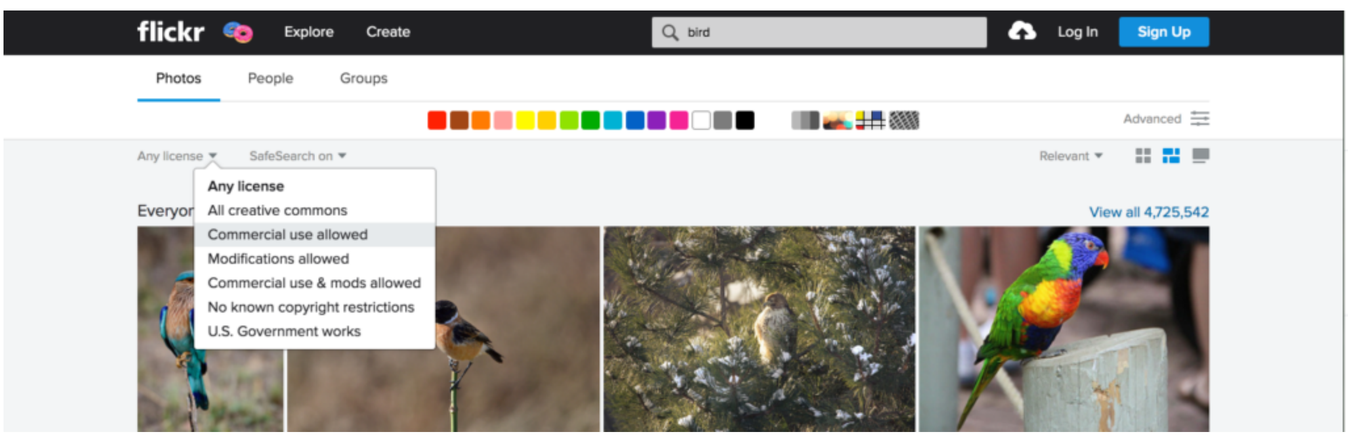

Figure 2. Filtering Flickr for permissions

- Google Images. A simple Google image search now has the function of searching for image based on usage rights. Click on "Tools" and then the "Usage rights" will appear for you to choose the type of license that fits your needs.

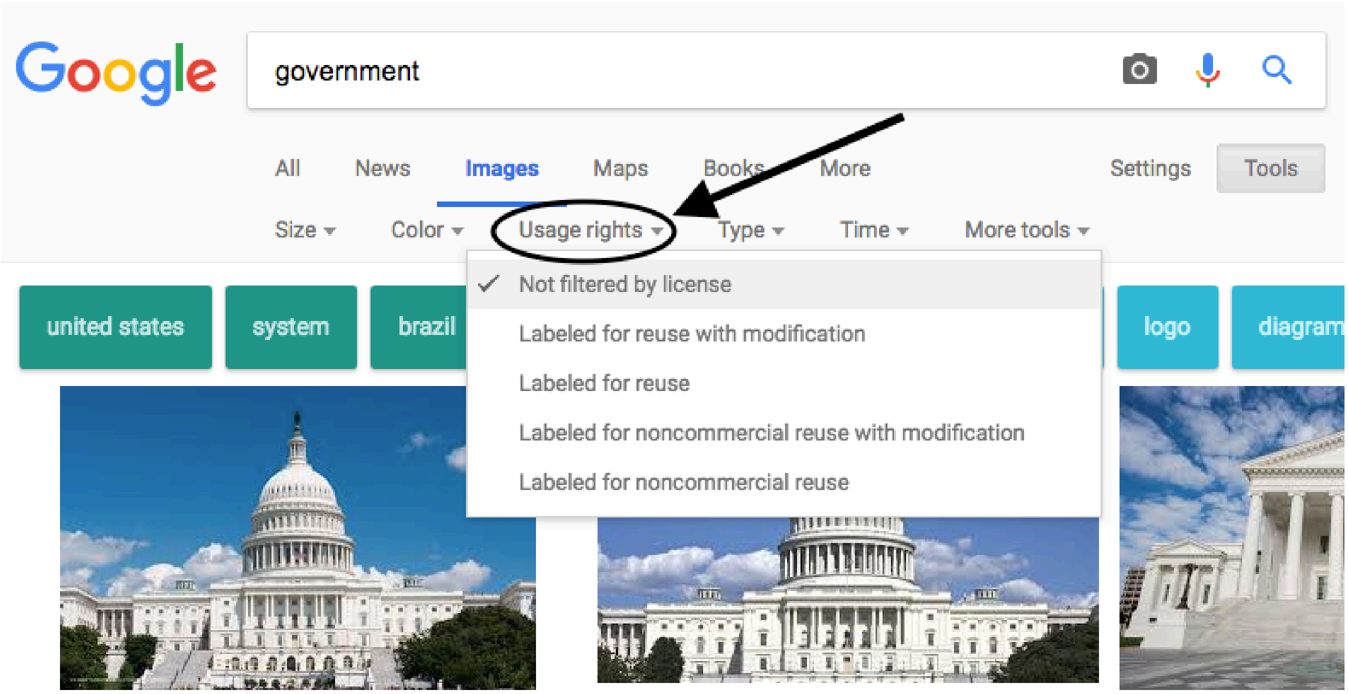

Figure 3. Filtering a Google Image search by license

CHARTS, DIAGRAMS, AND GRAPHIC ORGANIZERS

What you'll learn to do: Discuss how to most effectively use charts, diagrams, and other graphics in business messages and identify potential sources for these visual aids

When you communicate data, you can't just throw a whole bunch of numbers on a page and expect that readers will understand what you want to say. Charts, tables, and graphs help communicators organize that data in a way that helps their audiences understand the story the data tells and, hopefully, interpret it correctly.

In this section, we'll discuss the types of charts, graphs, and diagrams available to help you show off your data in ways that make it accessible to your audience. We'll look at specific communication challenges and determine which kind of chart or graph best illustrates your message, and finally, we'll discuss how to format your chart so that your story is easily and quickly understood.

LEARNING OUTCOME

- Discuss the appropriate use of common tables, charts, and infographics
- Describe factors in deciding which type of visual aid and graphic will best report your data
- Describe the impact of placement, style, and coloring when incorporating graphics into a message
- Describe the impact of descriptive captions and titles when incorporating graphics into a message

Tables, Charts, and Infographics

In this age of information, there are huge amounts of data to process and an equally impressive number of graphs and charts you can use to tell the data's story. Here are some of the more commonly used graphs and the kinds of stories they can help you tell.

PRACTICE QUESTION

An interactive or media element has been excluded from this version of the text. You can view it online here: https://courses.lumenlearning.com/wmopen-businesscommunicationmgrs/?p=4659

Numerical Data Charts

Let's talk about a few of the most common types of numerical charts:

- Bar graphs
- Line graphs
- Pie charts
- Stacked comparison charts

Bar Graphs

Bar graphs are used to compare categories. The *x*-axis (the horizontal line at the bottom of a graph) is usually used to show the categories: in this case, countries with universal healthcare expenses for 2015. The *y*-axis (the vertical line) isn't marked here, but it's clearly showing dollars spent in millions. The taller the bar, the more dollars were spent. This chart clearly shows that the United States spends more on health care per citizen than other countries. This is clearly identified on this chart with bars in contrasting colors. You can't help but notice it—it breaks pattern and it's a bold color that draws the eye.

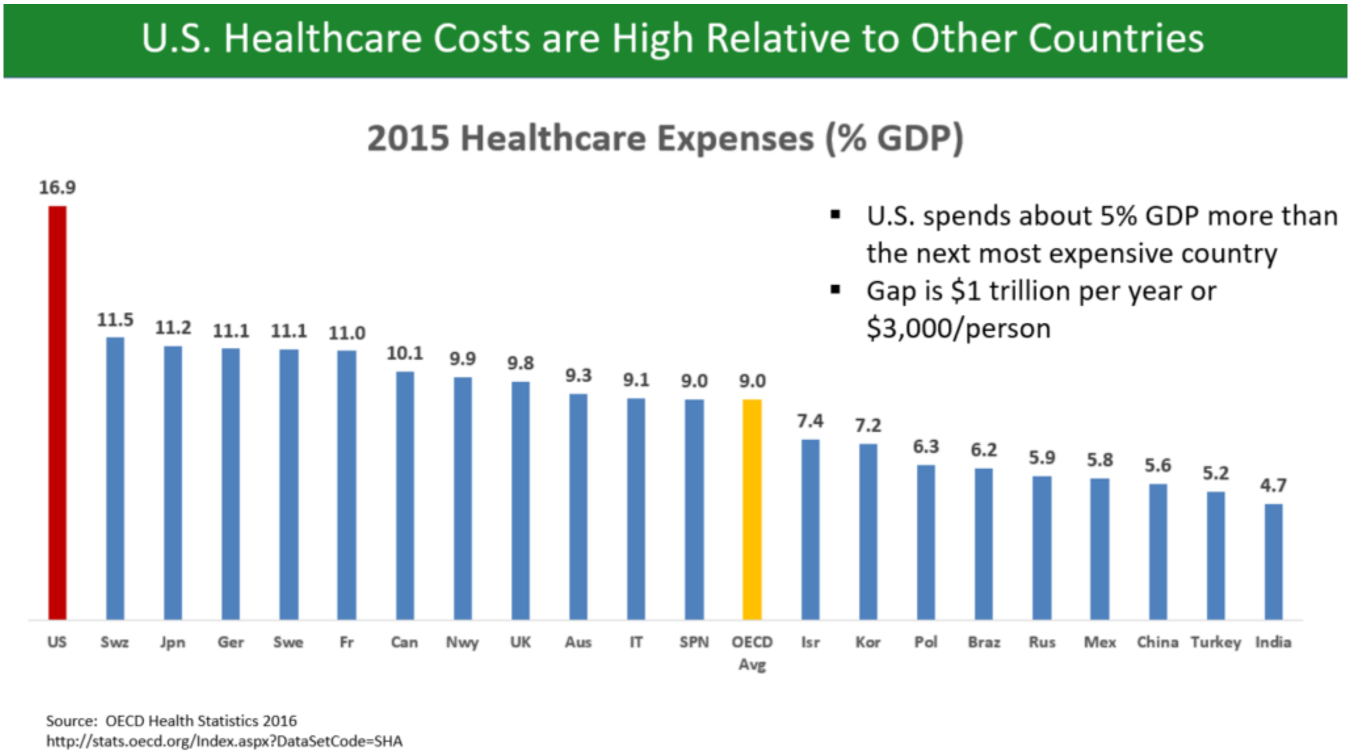

Figure 1. An example of a bar graph

Line Graphs

Like bar graphs, line graphs compare categories, but they're most often used to show trends. With the *x*-axis frequently showing the passage of time, the graphed data points will show an upward or downward trend of the categories in question.

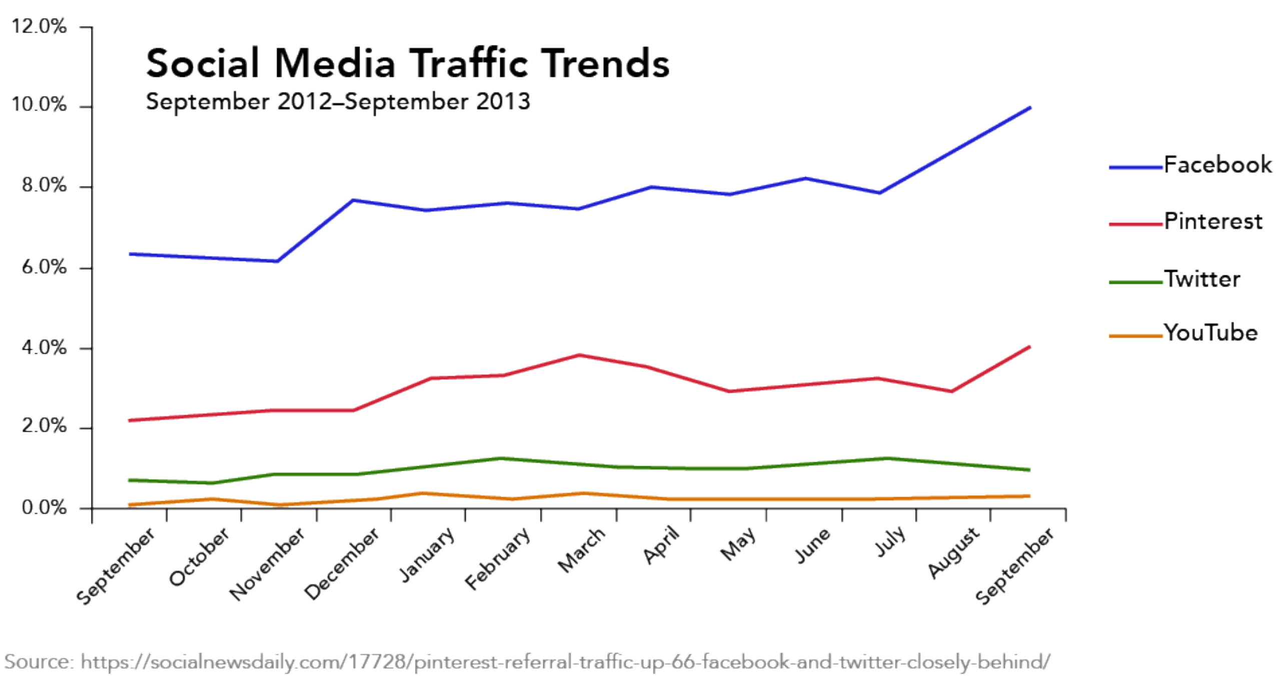

Figure 2. An example of a line graph

The line graph above illustrates social media traffic trends. Each social media organization is represented by a different colored line. The *x*-axis shows the passage of time, and the *y*-axis shows the percentage of media traffic each organization is capturing. The graph shows that Facebook traffic is trending up, while Pinterest has experienced some ups and downs. Third-place Twitter traffic is relatively flat.

Pie Charts

Pie charts show the composition of data, or the pieces of a whole. It can be as simple as "the team here is composed of 50 percent men and 50 percent women" or "Our sales are made up of 30 percent fiction books and 70 percent non-fiction."

In Figure 3, the whole pie (the whole circle) represents the total products sold at a store; the pieces of that pie show you the percentage of sales each department made. A chart like this makes it very easy to see that the clothing and accessory departments make up the largest section of sales, and fragrances the smallest.

Some comparison charts aren't shaped like a circle. Sometimes they're donuts, and other times they're shown in bars, as we'll see next.

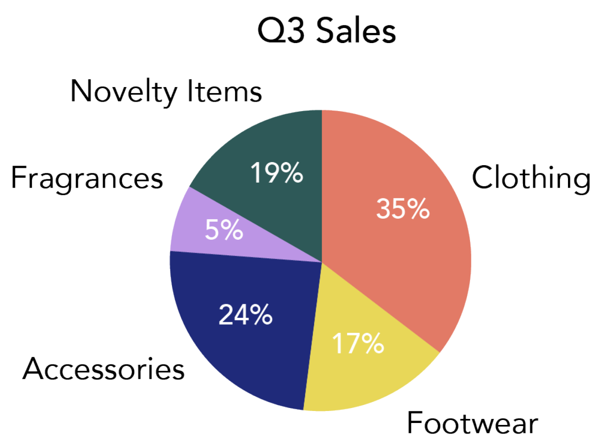

Figure 3. An example of a pie chart

Stacked Comparison Charts

You can compare categories with a "pie chart" approach, incorporating the composition factor in a variety of ways. The categories in this chart are represented by bars, but the bars themselves are composition charts. Each bar is valued at 100%, and the colored blocks represent different levels of pet ownership within the population.

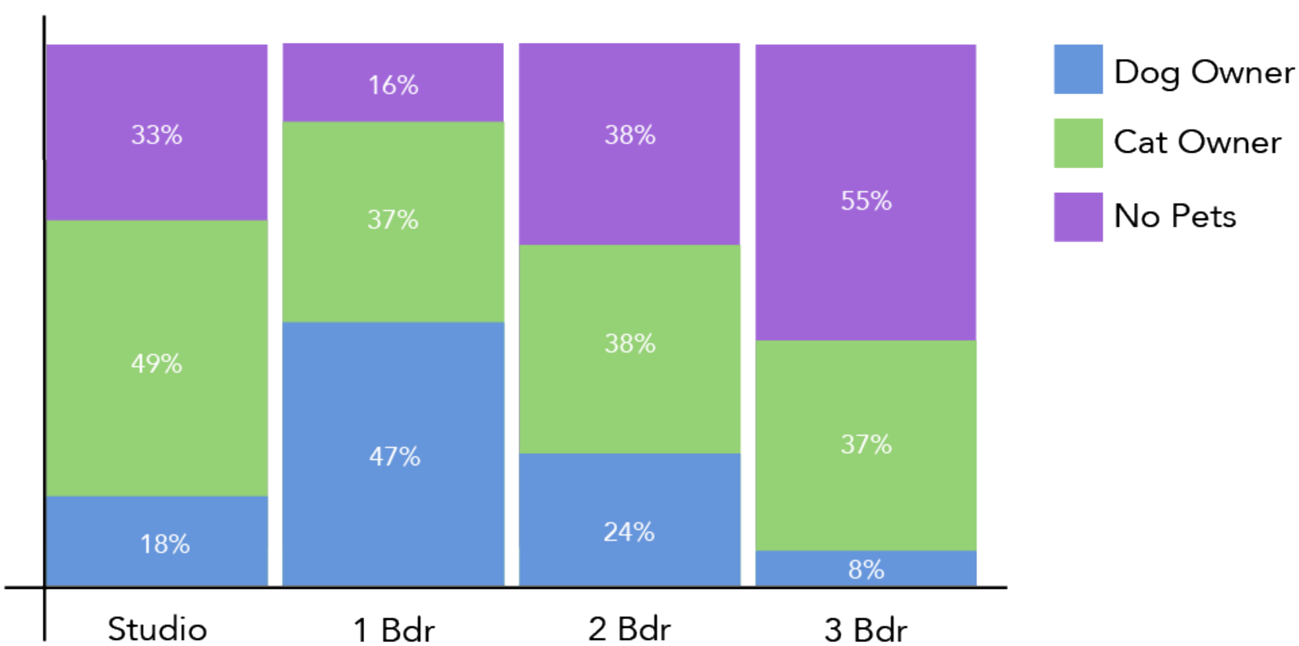

Figure 4. An example of a stacked bar graph

Similarly, the line graph below is "stacked" to show the level of sales based on product type. You're seeing a trend as well as a portion of a whole – comparing and viewing composition.

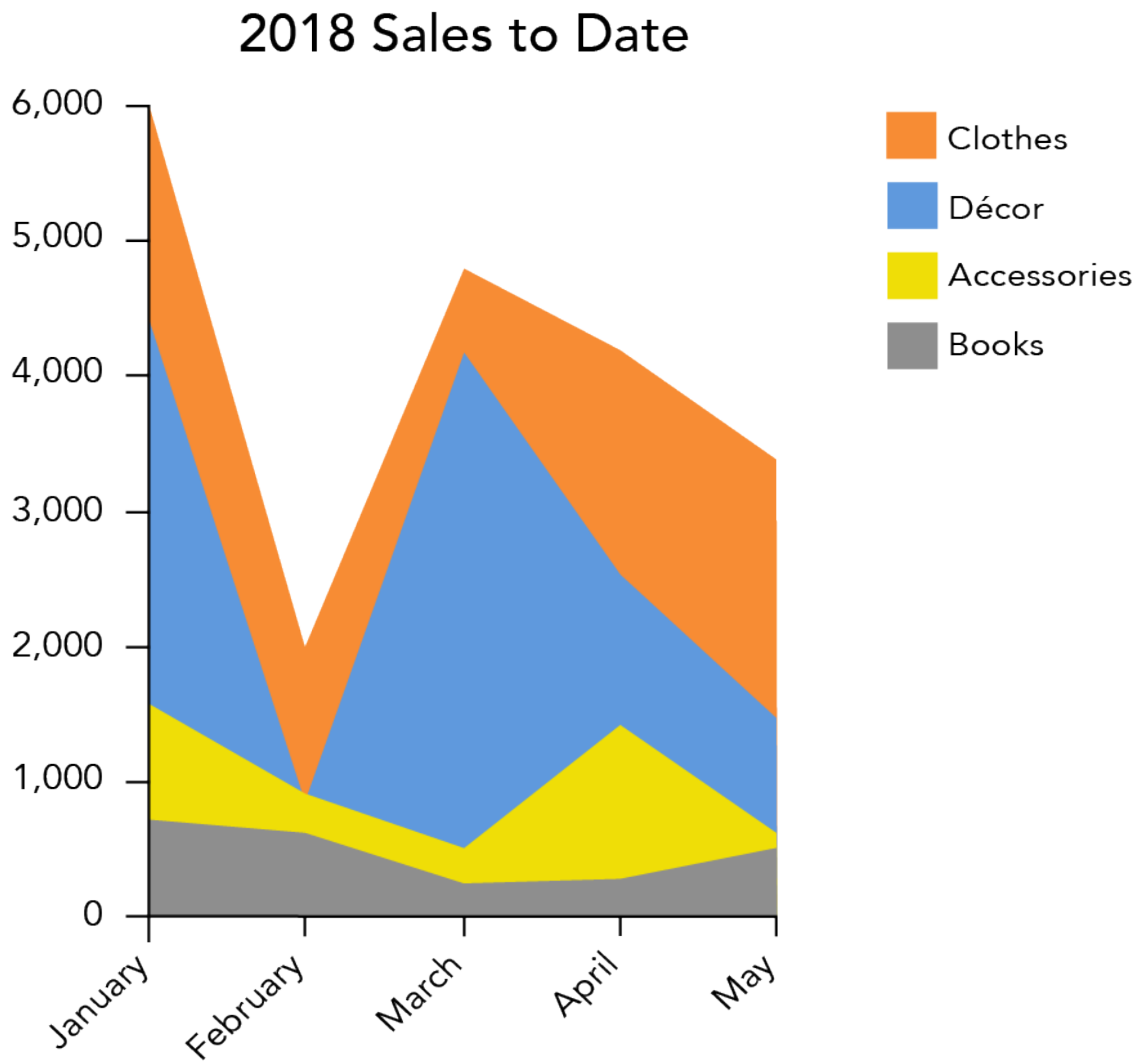

Figure 5. An example of a stacked line graph

Non-Numerical Data Charts

The charts above are very handy when your data is numeric. But there are charts for other types of data. Let's talk about a few of the most common types of non-numerical charts.

- Venn diagrams
- Flow charts
- Gantt charts
- Organizational charts
- Pictographs
- Infographics

Venn Diagrams

A Venn diagram shows a comparison of two different categories and the items they have in common. The diagram in Figure 6 shows us the different types of image types that can be safely shared on the Internet.

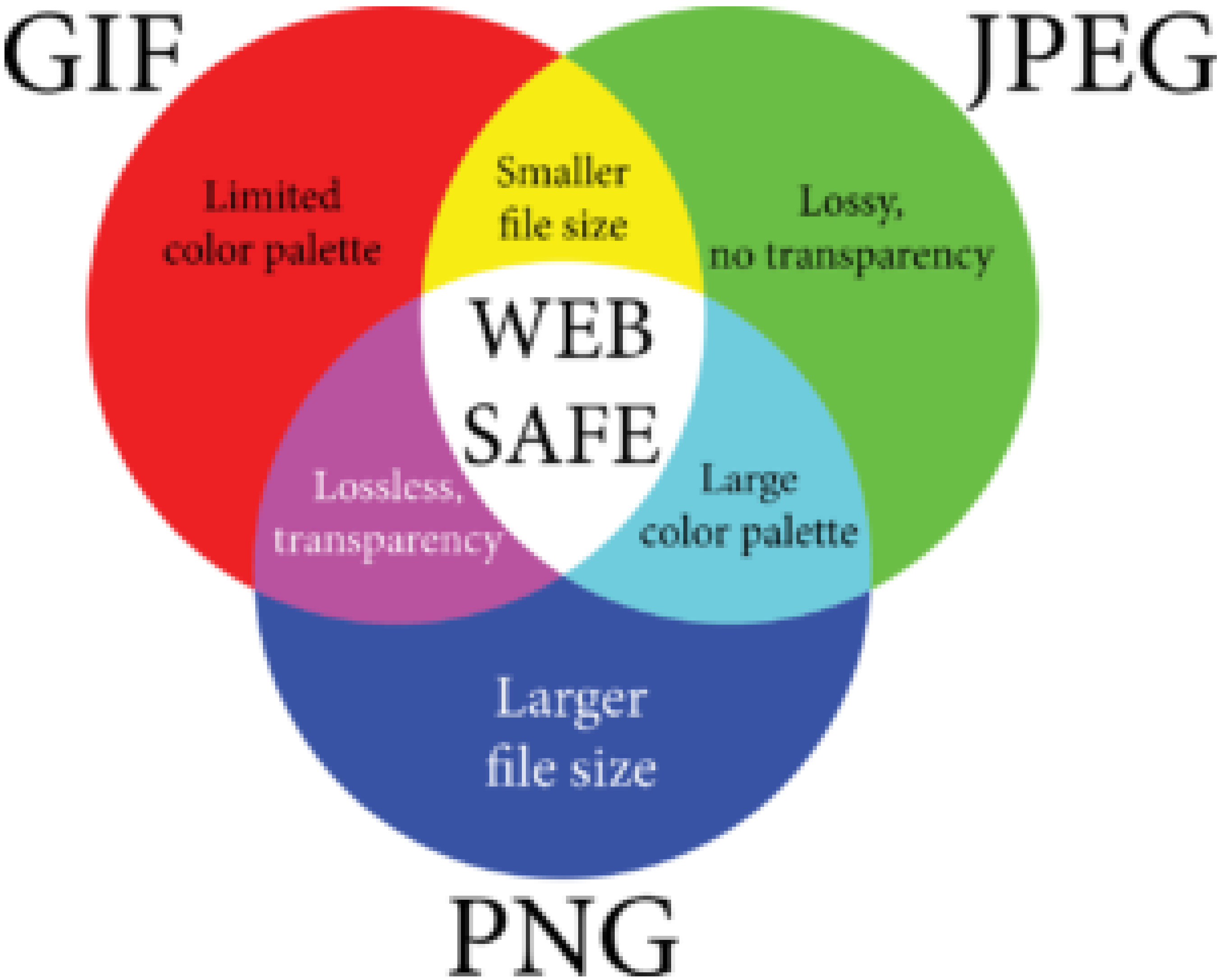

Figure 6. An example of a Venn diagram

Wherever the circles overlap represents a shared characteristic. For example, JPG and PNG files both have a large color palette, so they overlap in that area. “Web safe” is a characteristic shared by all three, so it’s in the middle where all the circles overlap. Areas of each circle that do not overlap represent characteristics unique to each file type—something they don’t share with any other file type represented.

Flow Charts

Flow charts show a process. Flow charts document a sequence of events from start to finish so that the process can be documented, followed, and managed.

The flow chart in Figure 7 shows the process of how theories are created, spread, and accepted.

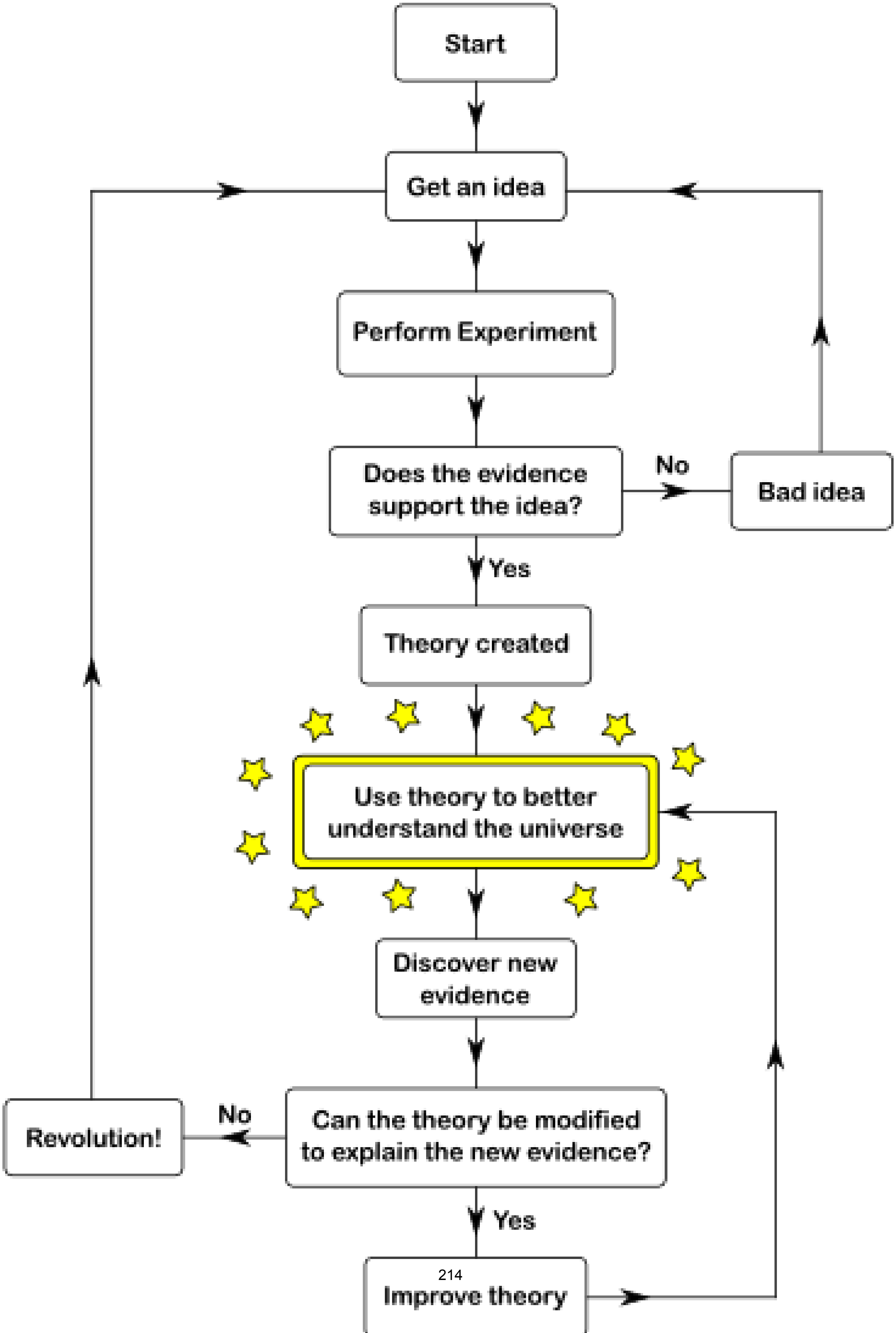
Start
Get an idea
Perform Experiment
Does the evidence support the idea?
No
Bad idea
Yes
Theory created
Use theory to better understand the universe
Discover new evidence
Can the theory be modified to explain the new evidence?
No
Revolution!
Yes
Improve theory

Figure 7. An example of a flow chart

You can see at the top there is an idea that leads to an experiment, and then the results determine which path is taken. If the experiment is successful or unsuccessful, different paths will be chosen. Along the path of the flow chart, all alternatives are presented and choices are made between them. Your eye follows the path from start to finish for every part of the scenario.

Gantt Chart

A Gantt chart is a timeline. Multiple projects can be added to the timeline with start and finish dates, and milestones and deadlines are also reflected. This chart is used to determine how long a project will take, the resources needed, and the order in which tasks need to be completed.

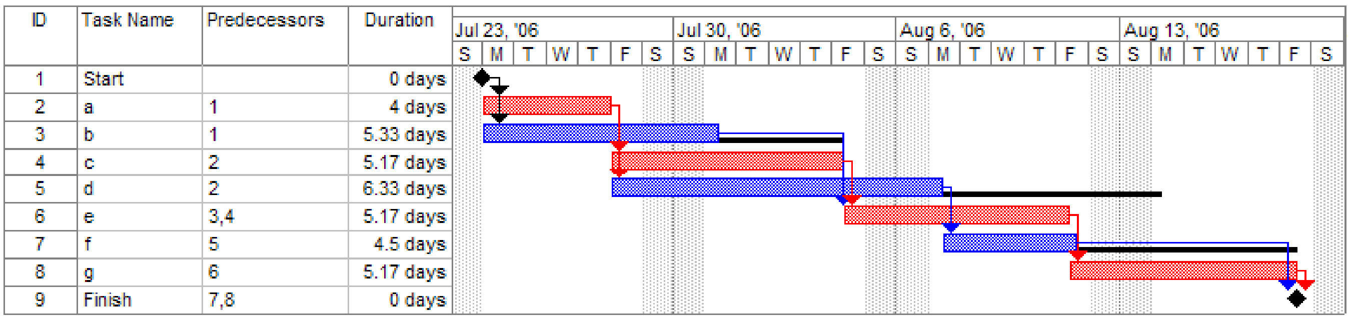

Figure 8. An example of a Gantt chart

In Figure 8, you have two different teams running one project. The Market Team (red) completes the market research and defines specifications by the week of July 23rd (the date of the first milestone). Then, the Planning Team (blue) takes over with the overall architecture and project planning and is responsible for hitting that second milestone on August 6th. As you can see, the Market and Planning Teams have additional work to contribute even after their milestones are hit, and the project is not complete until the end of November.

Organizational Charts

Organizational charts (sometimes call hierarchy charts) show the people in an organization and their reporting relationships. Usually, the organizational chart will have a chairman or CEO at the top, followed by a team of presidents and vice presidents, and then their direct reports, and so on. An organizational chart is usually created and maintained by human resource professionals who wants a visual view of their organization's structure and reporting relationships so they can make better decisions about leveraging the company's talent.

The organizational chart in Figure 8 shows a chairman at the top of the hierarchy and a managing director, quality assurance leader and a secretary reporting directly to the chairman. Each of those direct reports has direct reports of his or her own, and so on.

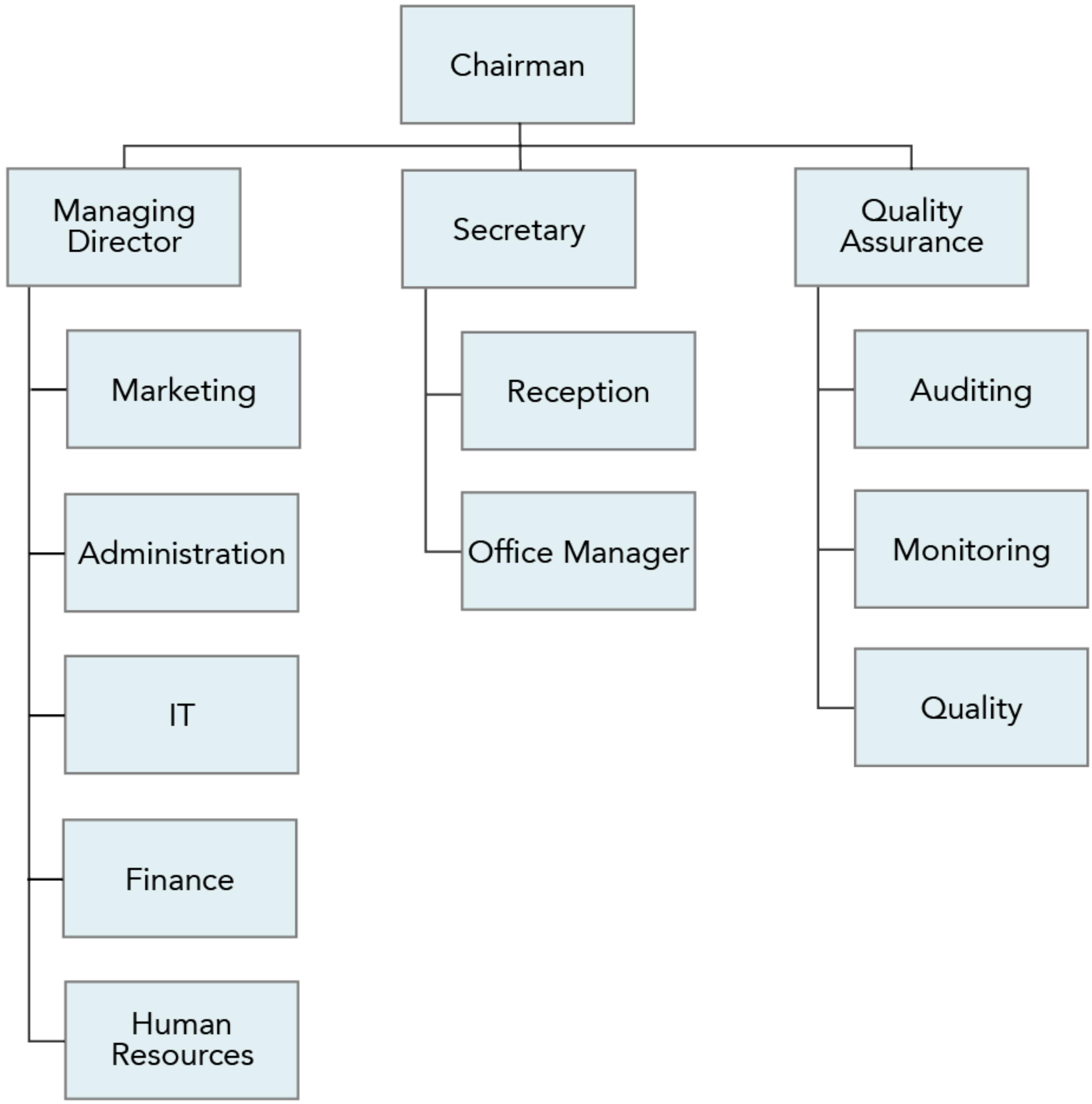

Figure 9. An example of an organizational chart

Pictographs

Pictographs use symbols and images to convey data, information, or ideas. The pictographs in Figure 9 are actually part of a resume and signal what kind of information can be found next to each pictograph (phone number, address, Twitter handle, and email respectively).

Figure 9. Four examples of pictographs

This makes it easier for a recruiter to view and pick out the necessary contact information. Other pictograms can convey processes (like the instructions to build IKEA furniture) or information (like when the weather app on your phone tells you it's going to rain today by posting a picture of a rain cloud).

Infographics

Similarly, infographics use pictures, but they also incorporate data and words, all to explain a single point. Infographics can be used to make a complex subject a little simpler to understand, particularly when there are more than two or three factors to consider. They can also be used to compare two or more categories and make your data more interesting and eye catching.

USDA United States Department of Agriculture

THE SUPERBOWL & CHICKEN

GOING STEADY SINCE 1967

SUPERBOWL 1	SUPERBOWL 52
JAN 15, 1967	FEB 4, 2018
GREEN BAY PACKERS VS. KANSAS CITY CHIEFS	NEW ENGLAND PATRIOTS VS. PHILLY EAGLES

32.6 LBS OF CHICKEN CONSUMED PER CAPITA IN 1967

INCREASED CONSUMPTION BY **182%**

91.9 LBS OF CHICKEN EST. PER CAPITA CONSUMPTION TODAY

23 CENTS PER LB. WHOLESALE PRICE FOR CHICKEN WINGS ON THE NEW YORK MARKET

670% INCREASE

$1.77 PER LB. AVERAGE PRICE FOR CHICKEN WINGS TODAY

THE RISE OF CHICKEN WINGS

BEGAN WITH A NEW RECIPE AT THE ANCHOR BAR IN BUFFALO, NY, IN 1964

Out of the pot and into the fryer- wings are way beyond soup stock now!

Though demand for wings was small, the bar served them as finger food. Wings grew popular as bar food until Super Bowl I, when they became a sporting event tradition.

15 MILLION FANS WATCHED SUPERBOWL I

31 BILLION CHICKEN WING

PORTIONS EXPECTED TO BE PRODUCED IN 2018 BY U.S. CHICKEN INDUSTRY

6.4 % WILL LIKELY BE MARKETED DURING THIS SUPERBOWL LEAD-UP

2 BILLION EST. CHICKEN WING PORTIONS GOING TO SUPERBOWL FANS

106 MILLION FANS EXPECTED TO WATCH IN 2018

9.5 WINGS PER FAN

February 2018 Agricultural Marketing Service

This infographic shows how chicken consumption relates to the Superbowl. You can see how consumption and the price per pound of chicken has increased over time. It also describes how chicken wings in particular have become more popular over time, all with a an eye-catching and entertaining quality that's engaging and interesting to the audience.

EVEN MORE CHARTS AND GRAPHS

This is not an all-inclusive list of the kinds of charts and graphs available. If you work in the science arena, you may find yourself using scatter charts or heat maps. Statisticians might be reaching for a trellis chart or even a function graph. Learn what graphs your industry relies on most and take the time to familiarize yourself with them so you can use these important visual communication tools to your advantage.

MAKING CHARTS AND GRAPHS

As we mentioned earlier in this module, all graphs and charts that you see on the internet are someone else's property, and using them in your work is stealing. But there's little reason to use someone else's chart—you're creating your own chart to communicate your own data! Here are a few tools that can help you create something great:

- MS Excel. You've probably stumbled upon the charts and graph tools in your Microsoft program long ago, and if it's simple graphs you want, that's an easy tool to use to create them. Google Sheets and Apple's Pages offer similar options. See Module 4: Research for more on making charts and graphs in Excel.
- Lucidchart. If it's flowcharts you're looking for, Lucidchart is the right place to start. This free, easy-to-use resource allows you to create flowcharts, organizational charts and diagrams that look smart.
- OnlineChartTool. If you're looking for something different in terms of bar charts and graphs, and you're tired of the graphics Microsoft Excel provides, take a look at OnlineChartTool. It might have what you're looking for.
- Beam. This tool allows you to make engaging graphs and charts, even on your mobile phone.
- BeFunky, Visme, and Canva. Don't let infographics intimidate you! Infographics are easily created with the BeFunky, Visme and Canva tools. These tools have free versions and include hundreds of images and templates to help you make a stunning visual.

Tables

A communicator can also use tables to display data. Tables can be formatted for words or for numerical data. They can be used for comparing data, or when one item has several data points associated with it.

Table 1 is a simple table of three people who are running races. George, Alana, and Sebastián each have four data points associated with them. By using a simple table, you can put all of this data in front of your audience. They can compare best times and review rankings of each runner.

Table 1. Running a Race

Participants	Races Run	Best Time	Average Time	Ranking
George	2	3:23	3:47	3
Alana	3	2:56	3:12	1
Sebastián	2	2:54	3:36	2

Table 2 is a bit more complex, and because of that, the data is not quite as accessible to the reader. But the data is complex as well, and if it's going to be displayed for ease of review, this seems like a decent choice. Table 2 shows the results of a survey where participants were asked to rank eight speakers (a male and a female of different English Language dialects) according to their professionalism, intelligence, education, friendliness, and sociability. The response rates are shown for male and female speakers, and then an average is calculated for each dialect.

Table 2. Average Perceptions of English Speakers*					
Standard American English					
Gender	Professional	Intelligent	Educated	Friendly	Extroverted
Female Speaker	5.83	5.83	5.75	5.42	4.92
Male Speaker	6.92	6.67	6.75	6.42	6.33
Southern American English					
Gender	Professional	Intelligent	Educated	Friendly	Extroverted
Female Speaker	5.75	5.17	5.00	7.25	7.00
Male Speaker	4.33	4.17	3.75	5.92	6.42
British English					
Gender	Professional	Intelligent	Educated	Friendly	Extroverted
Female Speaker	7.50	7.33	7.33	5.50	5.25
Male Speaker	6.50	6.25	6.17	5.17	4.92
Australian English					
Gender	Professional	Intelligent	Educated	Friendly	Extroverted
Female Speaker	7.00	6.92	7.08	6.25	6.42
Male Speaker	6.92	6.92	6.75	6.17	6.00
*Participants in this survey were asked to rate speakers on a scale of 1–10.					

Tables help you manage more complex sets of data. A table can be used if you're looking to display individual values, if values are being compared, or if data is going to be shown and then summarized. They won't convey your story to the reader as quickly as a graph might, but you will still be conveying a large amount of information in an easy-to-understand way.

Matching Graphics and Objectives

It can be difficult to determine what graph or chart to use when. Some are for numbers, some are for words… So many charts, so little time!

The flow chart in Figure 1 can help you in choosing the right kind of chart or graph to support your message.

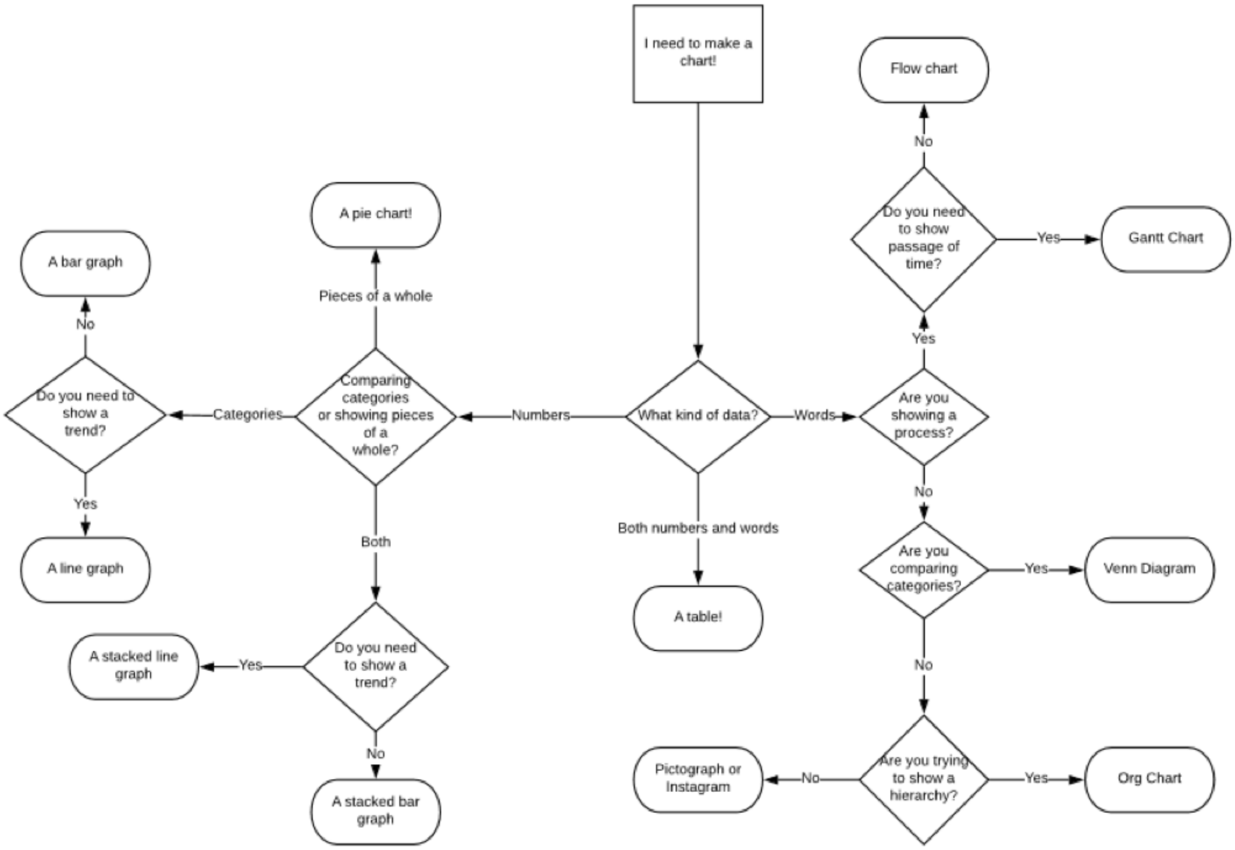

Figure 1. What type of visual aid should I use? Click on the image for a text-only version of this chart.

Now, was that easier than writing it all out?

PRACTICE QUESTION

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Placement, Style, and Coloring

Once you've decided what graph or chart to use, we need to make sure it fits with our visual media usage standards. It needs to make your message more accessible by being:

- Clean and simple
- Uniform
- Persuasive
- On brand

Let's build a pie chart and apply each of these standards to it as we go along.

Say you want to give a quarter bonus to the best member of each department, and you have settled on giving a $50 gift card for a movie theater. You have surveyed the company to determine which local cinemas are used by your employees to see movies. You have decided to make a pie chart from the results, because you're looking to show the composition of your employees and their movie-going preferences.

At the moment, your pie chart looks like this:

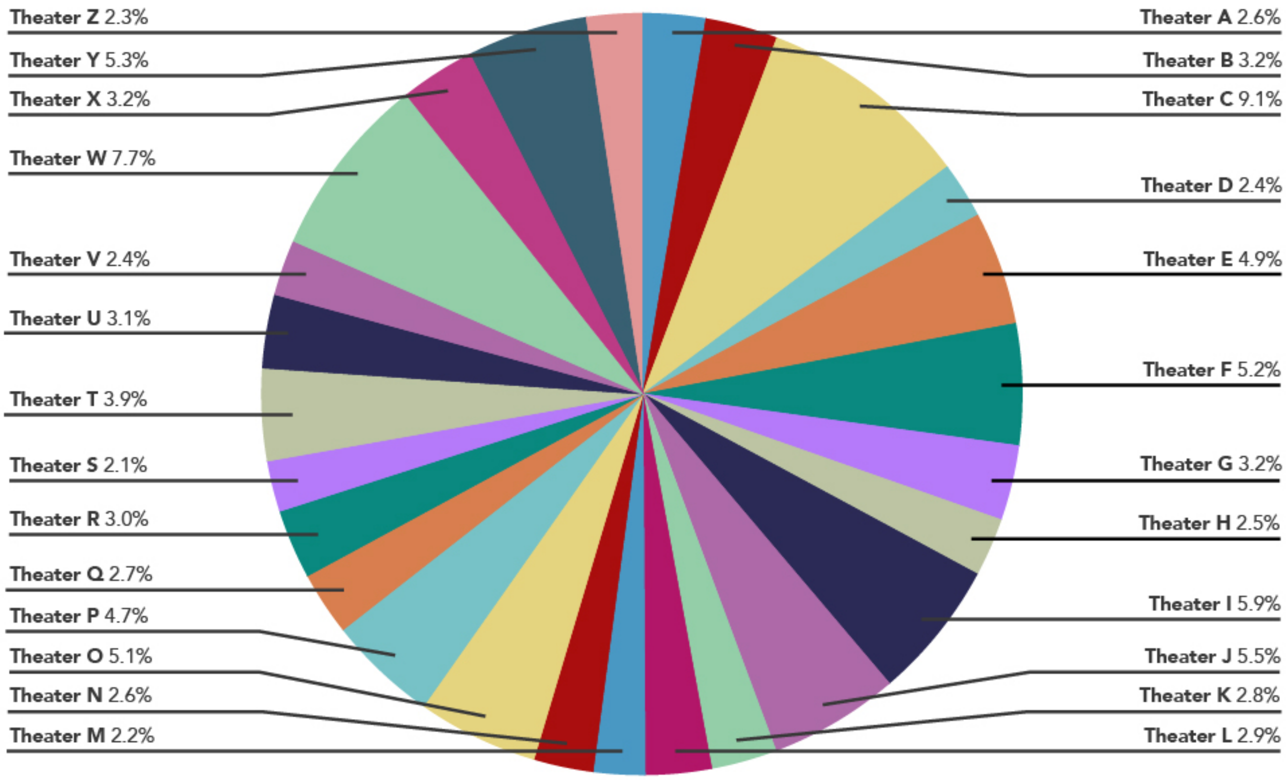

Figure 1. Which employees attend which theaters?

Figure 1 is definitely not clean and simple. There is so much to look at here that it's hard to see anything. No one will find this useful. In fact, a rule of thumb for pie charts is that if you have more than ten categories, you should present the information differently. (There's something called an exploding pie chart if you want to check that out.)

So how do we simplify the data? To begin with, we need to narrow down the categories. In this case, you could display theaters by company, rather than location, since all theaters of the same company will take the same gift card. Let's take a look at how the revised chart would look in Figure 2:

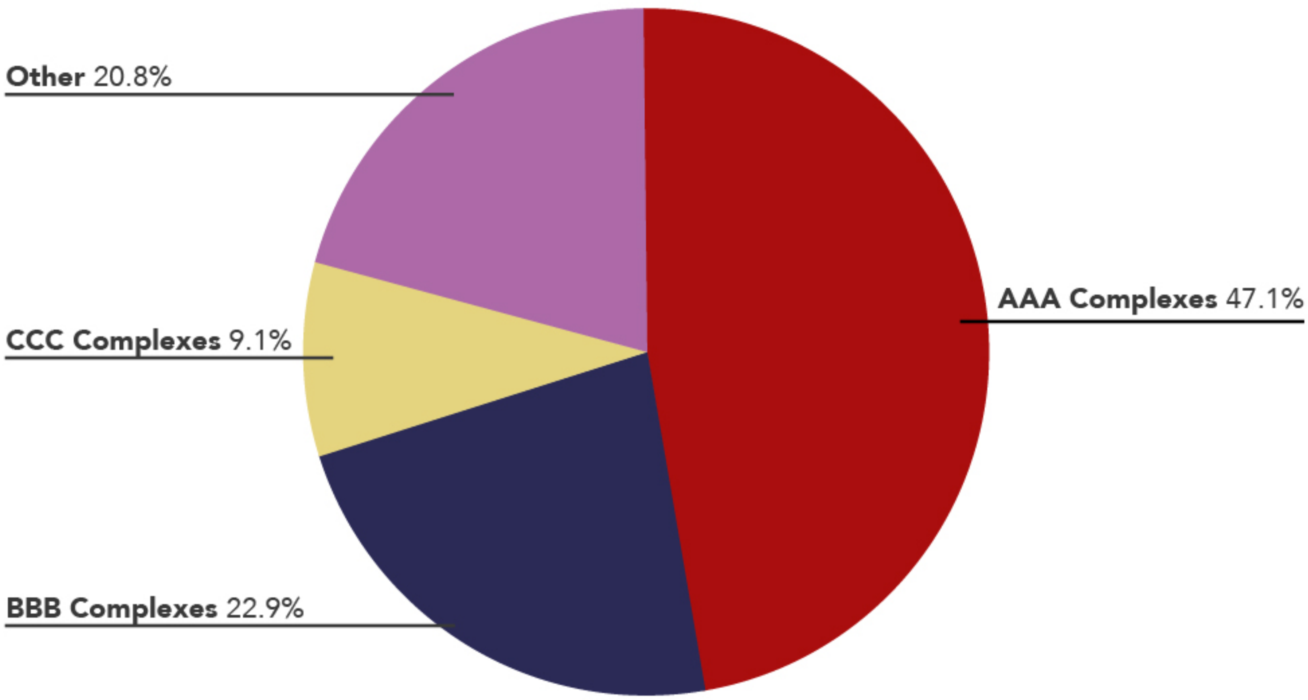

Figure 2. Which employees attend which theaters (by company)?

Now we're getting somewhere! This is a much easier chart to read. We can see at a glance that nearly half of our employees go to a movie theater owned by AAA, and smaller portions see films at the BBB and CCC theaters. This information has become way more accessible for the reader.

We've also chosen some bold, pleasing colors here. We can clearly tell what part of the pie belongs to BBB and what part belongs to the others. This is clean and simple!

Once we've achieved that, we must make it uniform. Do the rest of your charts, tables and graphs use the same bold, pleasing colors we use here? Have we chosen the same font size for our chart key? If the answer is yes, we can move on. We know that we are sharing information without distracting the reader.

Now we ask ourselves, is this data persuasive? Well, that depends on the story you're looking to tell. In this case, your best option is to purchase gift cards for AAA theaters because that is what your data is telling, since most of your employees enjoy seeing movies there. So let's give this a title:

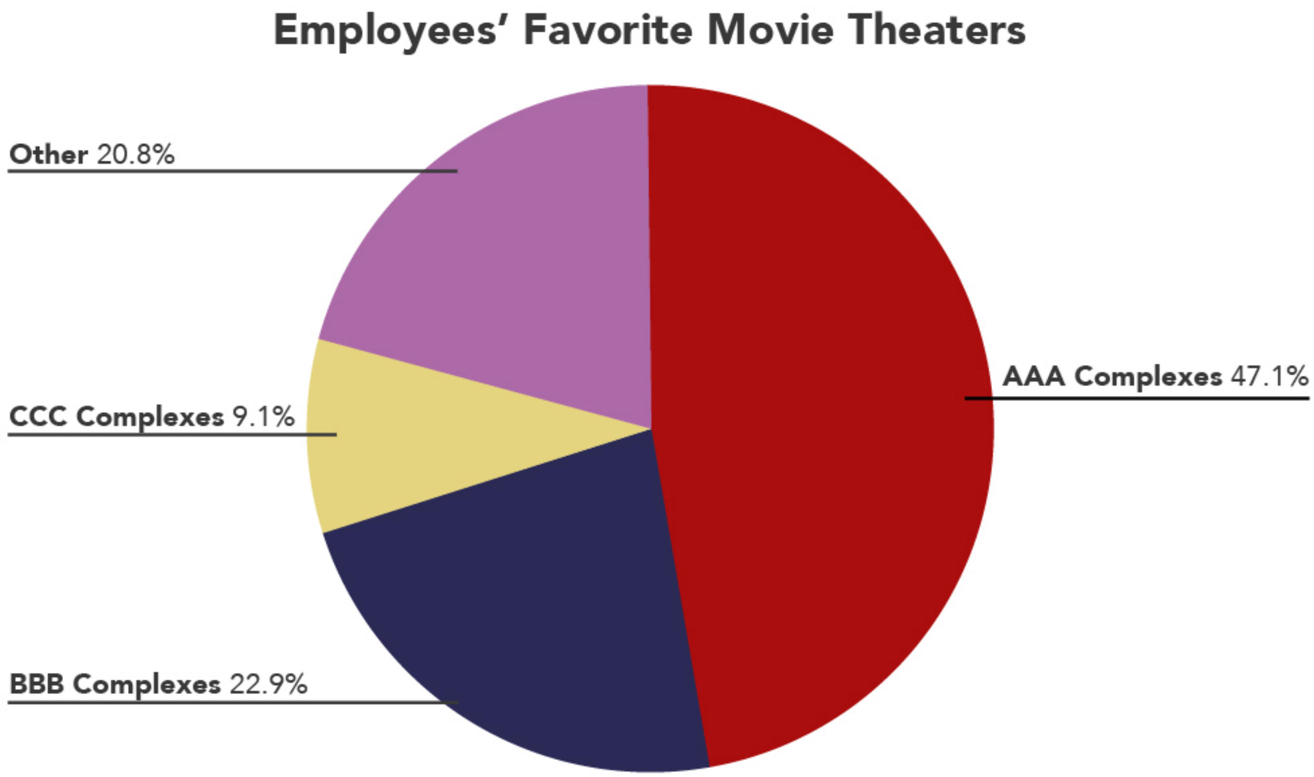

Figure 3: Your completed pie chart

Figure 3 a bit more persuasive. This immediately tells the reader "AAA Complexes are our employees' favorite movie theater."

Now, is your chart on brand? If your company's palette of colors includes blue, red, yellow and green, then yes! We are on brand. If your company uses different colors, go ahead and change them. A lot of companies have very specific color requirements, even for internal projects, so be sure to look out for your company's style requirements! For this project, it's as easy as that.

You've made the point of this communication very easy and accessible by making these changes and following our standards of visual media communication!

PRACTICE QUESTION

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ADDITIONAL RESOURCES

- Misleading Graphs: Real Life Examples
- Good Data, Bad Graphs

Captions and Titles

Most of the time, putting the data into graph form isn't quite enough. In fact, it's just the start. You created this graph to help you tell the story of your data, and to ensure your message gets across, you need to be clever about the captions and titles you include.

You'll find most communicators title their graphs according to the content they display. It might say "Year-over-year performance" or "Weekly Average Ticket Sales." But if your message is about how weekly average ticket sales are down 10 percent compared to last year, you might consider calling your graph "Average Ticket Sales are Decreasing."

WATCH IT

The video below is a demonstration about how to make a graph tell your story by making it easier to read and making the title active:

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Captions usually indicate the source of information. If your sources and communications are not produced by people within your company, then this is an important step. Captioning the source gives your information credibility and strengthens your story.

PRACTICE QUESTION

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You can also use captions to convey other pertinent information. You may want to include the sample size of a survey the graph is illustrating or additional background information about the data (as shown in Figure 1). Using captions in this manner helps the reader draw the right conclusion.

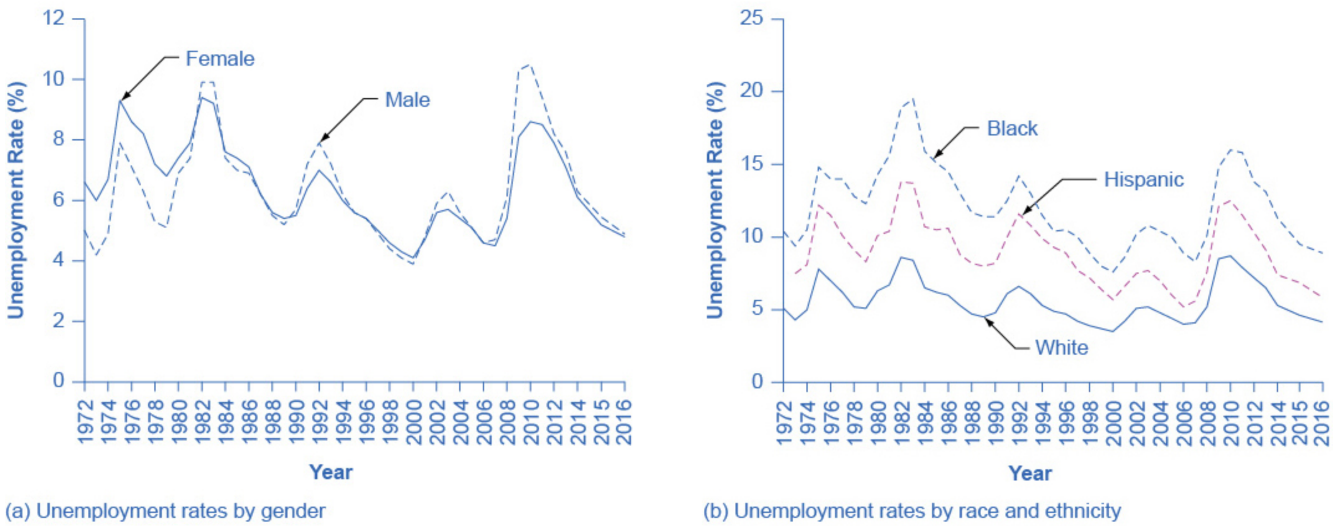


Figure 1. Unemployment Rate by Demographic Group. (a) By gender, 1972–2016. *Unemployment rates for men used to be lower than unemployment rates for women, but in recent decades, the two rates have been very close, often—and especially during and soon after the Great Recession—with the unemployment rate for men somewhat higher.* ***(b) By race and ethnicity, 1972–2016.*** *Although unemployment rates for all groups tend to rise and fall together, the unemployment rate for blacks is typically about twice as high as that for whites, while the unemployment rate for Hispanics is in between. (Source: www.bls.gov)*

A caption on a graph can go badly when there is more information captioned than is of interest to your audience, or if information included in the caption would be better displayed elsewhere.

Let’s take a look at this line graph displaying the percent of world GDP (Figure 2):

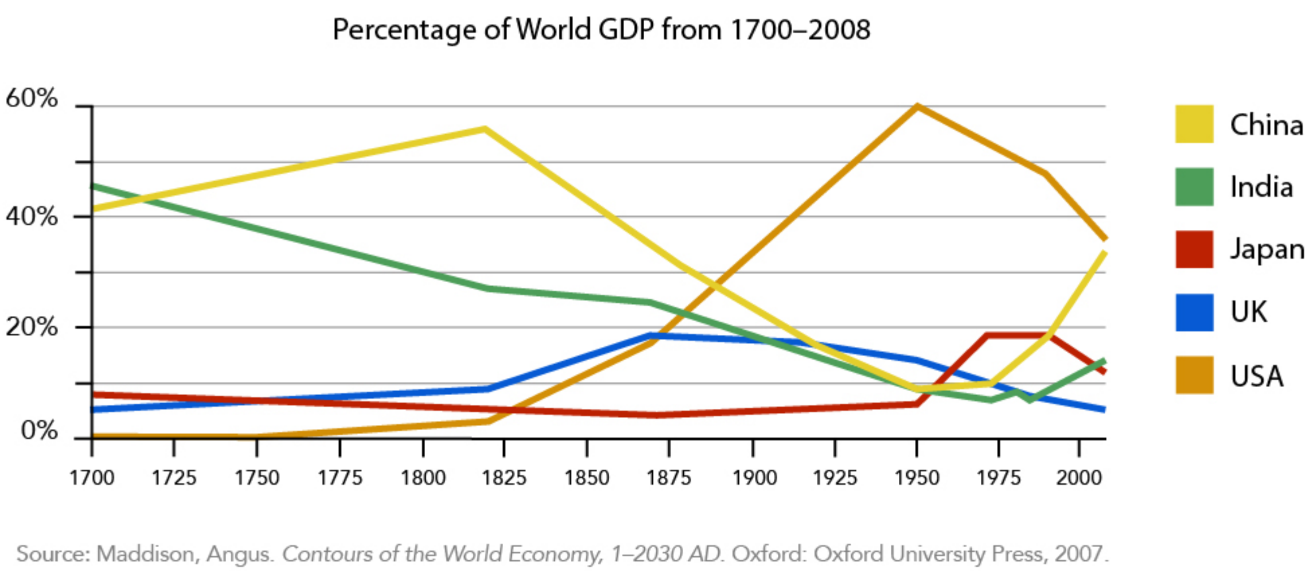
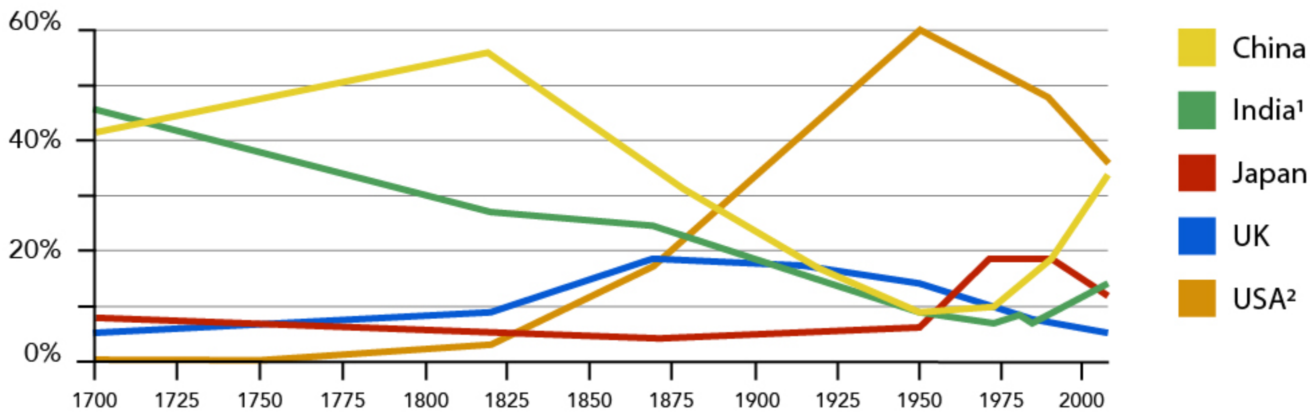


Figure 2. Percentage of World GPD from 1700–2008

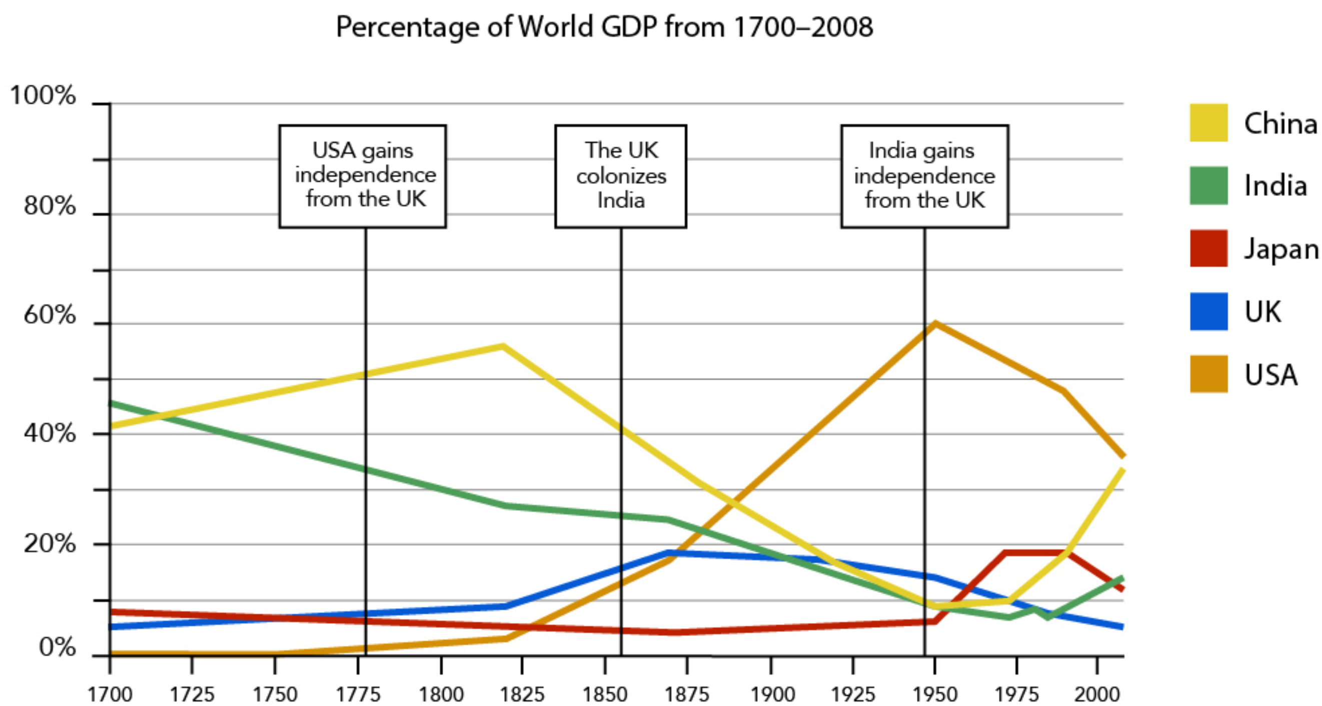
Imagine if the graph above, which shows the percent of the world’s gross domestic product from 1700–2000, looked more like Figure 3:



Source: Maddison, Angus. *Contours of the World Economy, 1–2030 AD*. Oxford: Oxford University Press, 2007.

Figure 3. Percentage of World Gross Domestic Product by Country. *You will note that (1) India was officially under British rule starting in 1858, when their entire GDP was transferred to the UK. India gained its Independence in 1947 after WWII. (2) The US was colonized by the British and was not its own country until 1776.*

Now the title is included in the caption, as well as some information about British colonization. How could we make it a little easier for the audience to absorb that information?



Source: Maddison, Angus. *Contours of the World Economy, 1–2030 AD*. Oxford: Oxford University Press, 2007.

Figure 4. It should be noted that India's GDP was actually considered in the UK's totals from 1858 to 1947.

Figure 4 is even better. Now the graph is titled, and those instances of colonization are marked on the timeline. However, let's imagine the author is focusing on India in their report or presentation. In that case, the note about the colonization of the United States isn't quite relevant and should be trimmed out (Figure 5).

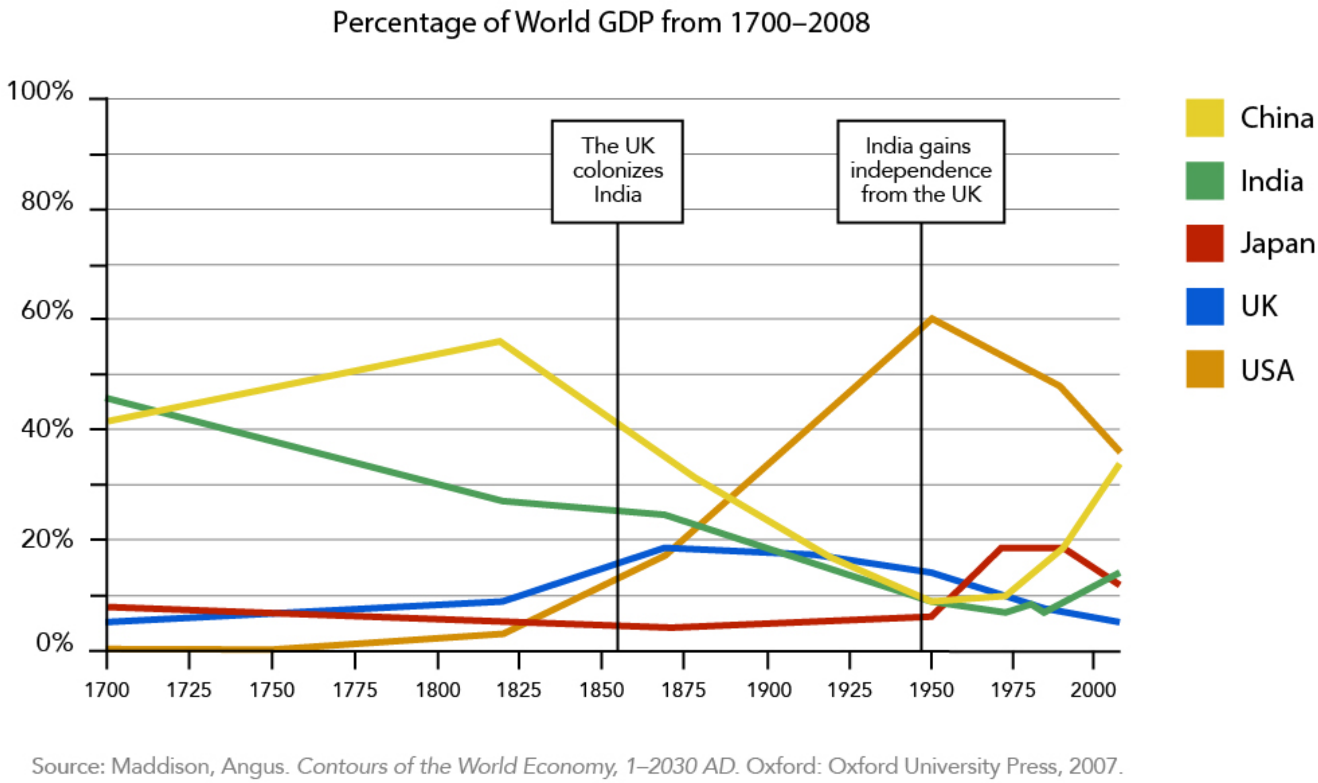


Figure 5. It should be noted that India's GDP was actually considered in the UK's totals from 1858 to 1947.

Much better! Now the graph shows only the information relevant to the point the creator is trying to make.

Visual media should always make a point clearer, so make sure your graph's format, titles and captions are working for you rather than against you.

CONTEMPORARY VISUAL AIDS

What you'll learn to do: Discuss the use of video in business messages

Every day, hundreds of hours of video are uploaded to YouTube, and a millions of hours of video are watched. Impressive, to be sure, and while it doesn't mean that your audience is out on YouTube searching for business communications, it does mean that they've grown accustomed to, or have even established a preference for, consuming information delivered on video.

Luckily, videos are amazingly easy and inexpensive to make these days. A communicator can create and deliver a video using nothing more than a phone; or, with minimal investment, purchasing a few microphones and a camera with a decent lens can create a more polished, higher-quality product.

If it's true that facts bore and stories sell, then perhaps your message is better delivered in the format of a video. In this section, we'll talk about the kind of message that works best for a video and how to put together your first blockbuster communication hit.

LEARNING OUTCOME

- Discuss the pros and cons of using videos as a visual aid
- Describe the process of planning, designing, and producing a video as a visual aid

Video as a Visual Aid

Video helps you tell a story in the most visually engaging way possible, giving every employee in the company a face-to-face opportunity with the CEO, or allowing for the broadcast of team meetings and gatherings. Making a video that features the employees who work at your company can "humanize" the company's image, a valuable tool when communicating with investors and other external stakeholders.

Videos are an excellent visual media choice when communicating things like,

- The features of a new facility or office the company has opened
- The details of a new product or service the company has introduced
- Instructions for a new company process, like signing up for benefits or a new 401k plan
- The introduction of a new business idea, plan or merger, especially if the subject is complex or the audience is highly emotional about the announcement
- Webinars and meetings that all attendees might not be able to attend in person

PRACTICE QUESTION

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While videos can be easy and inexpensive to produce these days, it can still be costly to create a professional, polished video. A video made on your camera phone likely won't be appropriate for any medium besides a short post on social media. Beyond the cost and talent associated with creating more complex videos, there are a few roadblocks you might encounter, even when creating a short clip. You might want to reconsider video as a choice in any of the following scenarios:

- Your human subjects are visibly uncomfortable in front of a camera and cannot deliver a message effectively in that manner
- Your subject requires the display of a lot of data, and the audience will require time to review, contemplate and study the information
- Your video is longer than fifteen minutes and viewers are likely to tune out after a while
- You're covering a sensitive topic or the topic of discussion shouldn't be made public in any recorded format, written or visual

Video can be used to accompany text, or it can stand alone as its own communication. Consider where your audience will access the video, what information will accompany that video and in what format, and how they'll work together when you start to plan the creation of your video.

WATCH IT

Take a look at this video "What is the Best Explainer Video Style for Your Business?" and the accompanying article *"How Our Explainer Video Got to Rant #1 On Youtube (real case study)"* by Juan Jose Mendez.

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Designing a Video for Your Needs

If circumstances present themselves, you may want to consider creating your own video as a visual aid. This means you might need to wear multiple hats—screenwriter, director, and producer.

Let's imagine a scenario where you work for a pet supply retailer, and you've been asked to put together a video that helps your human resources department recruit the right individuals for positions in the retail stores, distribution center, and corporate office. The video should cover four or five different elements, is only a couple of minutes long, and has a medium level of complexity. Feel free to skip steps as you see fit, based on the complexity of your project. Let's get started!

Writing the Story

Videos are a storytelling tool, so first you need to determine what story you want to tell. You do this by:

- **Interviewing stakeholders.** Always sit down with a subject matter expert (SME) to determine what needs to be covered in the video. In order to determine what you want to advertise about your workplace, sit down with your recruiters and find out why people come to work at your company. In the case of the pet supply company, you find out that people enjoy working for the company because they love animals, they like the people they work with, and they get to learn great things. They also enjoy interacting with their customers and the community. Good information! These ideas and concepts will be the building blocks of your story.
- **Assembling a storyline or storyboard.** If you're going to highlight these qualities in a video, you need to put together the outline of a story. In the video it's a good idea to start out with a couple of broad statements about what it's like to work at the company. Then you'll cover each one of those reasons people work for your company (loving animals, great teams, etc.) a little more in depth. Finally, you'll end with a couple of thoughts that reinforce that your company is a good place to work.
- **Writing a script.** If you have very specific items that you want to capture, this would be the point at which you'd assemble a script. Sticking with the pet supply example, you're going to go out on the road with your camera and interview people who work for the company. It's better to let them tell you in their own words what they like about working at the company, and maybe ask a couple of questions that lead them to talk about loving animals or enjoying their interactions with customers. However, if you want a very polished, smooth video (for sales purposes, let's say) you might want to write a script. If you do, read it through out loud a few times to make sure it sounds as good as it looks.
- **Choosing people to interview.** Once you know what you want to do, send out a message to your field leaders in all areas of the business. Those leaders have a really good idea which of their employees would enjoy the opportunity to talk about their work. They'll assist you in choosing employees who would interview well and have great things to say.

Getting Ready to Film

Now that you have a basic idea of what kind of story you want to tell and how you're going to tell it, you're going to pack up your equipment and get on the road. The things you will need:

- **Your camera.** Today, most decent digital cameras have video capability. Make sure you have a good camera and lens, particularly if your final product is going to be shown on a large screen. A good DSLR (digital single lens reflex) camera is more than adequate to capture high-quality digital video. Most cameras are pretty point-and-shoot friendly, but read the instruction booklet carefully if it's your first time using the camera. Make sure you have a cloth for cleaning the lens, and make sure your batteries are charged!
- **Your microphones**. Good mics, even wired or wireless lapel mics, are fairly inexpensive. Pack a couple to take along with you so you can capture the best sound quality possible. If you're following a group of people around from place to place and trying to capture sound, a horn mic is an excellent option that won't restrict your sound capture. Pack a couple of batteries for each device so you're not caught off guard. (Note: it's always good to have a second source of sound in case a microphone fails. Videographers often use handheld sound capture devices to record while they're filming, to keep as a backup).
- **Your tripod.** Find a good, sturdy tripod that allows you to keep the camera still while shooting, and pan (move) the camera right, left, up and down. Even though it's a little heavier, purchase a tripod that has some heft so the camera's not easily knocked over. If you want to be able to move around more, look for tripod tools like a dolly (wheels for the tripod) or a monopod, which is a one-legged post/pod that helps stabilize your camera while you're filming but allows you to move more easily and get into tighter spaces.
- **Your script and notes.** Don't forget to write down the questions you want to ask or the script you want your subjects to read/act out. Look it over a few times in advance and familiarize yourself with what needs to happen while you're onsite at the video shoot.

You can also consider things like lighting and make-up if you're going for a more professional look. You can contract with a video company to do the actual filming if you prefer to hand those details off to an "expert." OR…you can head out with your mobile phone and forget all the extras.

Filming Your Video

You've arrived at your filming location, and the person your interviewing is ready to go! You'll need to get your equipment set up and then start your filming. Remember to

- Scope out a quiet but well-lit place to do your filming. Today you're interviewing a store team member, so you may want to film in one of the aisles of the store, but find one that doesn't get a lot of foot traffic!
- Make sure your camera is securely on the tripod
- Test all the equipment to make sure it's working properly. Check battery levels. Do a couple of test shots and play them back to see how they look and sound.

Then, it's time to film. Turn on the camera and start asking your questions. Some good hints to follow:

- Ask your questions and get answers the first time around. When an interviewee is telling a story, he or she is almost always more animated the first time through. If you ask the interviewee to repeat it, the story will probably not be as entertaining! If he or she is nervous, you can tell them that you're practicing, and that usually puts the speaker at ease.
- Coach your interviewees to repeat the question in the answer, so you can edit yourself out of their responses. If you ask, "Why do you like working here?" the interviewee should respond with, "I like working here because…"
- Shoot your subject from the waist up with a lot of background all around him or her. You can always close in on the subject when you edit, but you'll never be able to get a longer shot!
- Capture a little bit of the room's ambient noise when no one is talking. Recording five or ten seconds of silence will help you fill in dead space if you have to edit out a noise or a sound. Every room has its own special noise—an HVAC unit running in the background, a radio playing softly—and when it's missing from the background you notice!
- Film in short spurts. Don't create a 20 minute file. Digital files that are three and four minutes long are much easier to view to determine if there's any useful footage.
- Capture more footage than you think you'll need! Especially when you're shooting footage to compliment the video. That's called "b-roll" in the video business, and it constitutes the action shots you see when

someone's being interviewed. The interviewee might be talking about helping customers in the store, and you see the interviewee in action helping a customer while she's talking. That's b-roll. If you know you're going to need b-roll for your video, be patient and film a lot of it. You always need more than you think.

Editing and Post-Production

You've filmed your video, and now you're going to put it together. This is where you add the style and pizzazz that makes your video engaging. Let's get started.

- **Organize your footage.** Take a look at your footage and determine which files you'll be using for your final product. Go back to your notes, review your story structure, and assemble your digital files so that you know what footage you will use in what part of your story.
- **Start placing your chosen footage into an editing program**. Import all the footage into your editing program and start putting your story together. Determine where you can use graphics to break up sections and where you will need to add text to help tell the story or break up the sections. In this video you're making for the pet supply company, you've decided to call out the "pluses" of working there, which include loving animals, a great team of people, opportunities to learn, and so on.
- **Pick out some video music.** This is important and will be an influencing factor in your final product. Often you're going to want to make cuts and add transitions based on the music, so now's the time to pick a song and set the mood of your video! Check out the next section for some excellent places to buy royalty-free music.
- **Edit.** If you've never edited a video before, please be sure to take some time to play around and see what the program will do. Go online and check out YouTube videos that give hints and tips for the program you're using. But the best way to learn is to just play with the software and experiment. You'll learn by doing!
- **Add company graphics and branding elements.** Make sure you include your company logo and the elements of the brand that make your company identifiable!

Once the editing is complete, circulate it around to your subject matter experts for approval!

ASSESSING THE FINAL PRODUCT

Take a look at this final product and let's determine if it fits our standards of good visual media:

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Let's take a look at each standard separately:

- **Is it clean, clear and simple?** Yes, you've established a theme up front that there are "pluses" to working for Pet Supplies Plus. Your speakers are featured prominently in each of your shots, and you have nicely framed b-roll shots.
- **Is it uniform?** Absolutely! Your titles of "Plus the opportunity to learn" and "Plus the uncommon" teach the audience what to expect right up front.
- **Is it persuasive?** Yes. Not only is the audience getting short, clear soundbites from interviewees talking about the reasons why they should be rushing out to apply for a job there, but they're being emotionally engaged with the kittens and puppies. There was a pig with sunglasses for heaven's sake!
- **Is it on brand?** That's the most important thing! Pet Supplies Plus prides itself on delivering an outstanding customer experience, and it's clear in the theme of this video that there are outstanding experiences happening in their stores daily. Their logo and their tagline are featured at the end.

This video makes the working experience at this company very accessible to prospective employees. Would they have gotten the same interactive experience if they'd been reading a website or an article? Probably not. This video brought the work experience to life. And that's what video can do for you as a visual media: it gives your story life like no other media can.

PRACTICE QUESTION

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Products and Resources for Creating Videos

As we mentioned a couple of times earlier in this module, it's not legal to snag things off the internet and add them into your videos without checking to see who owns the rights and whether there's a cost attached. This goes for images, music, and even video. But, rest assured, there are good songs, video and editing tools you can use for free or cheap.

Music

- Melody Loops. Melody Loops is a low-cost source of royalty free music, and they have a huge database of music you can search by type or even "feeling." (Want happy music? Just search "happy"!) You can download samples of the music to test them under your video before you download the actual sound file, so you can make sure it works before you purchase.
- Incompetech. Incompetech is another royalty-free music site with lots of great tunes to choose from. Again, there's a minimal cost for the music. All the songs on the site are written by one person, and he likes to be credited on your work, but he's talented and it's worth it!

Video

- Internet Movie Archives. If you're looking for old film, interesting film clips…well, there's a world of good videos on this site. From old instructional videos to entire feature films, these are all public domain and can be downloaded.
- National Parks Multimedia. The National Parks have an archive of video footage from nearly all their parks that you can download.
- Wikimedia Commons. Wikimedia Commons offers all of its images, video and audio footage to use, but follow their reuse guidelines so you're giving credit where credit is due and following the licensing rules for reuse of the content.
- Vimeo. You can search Vimeo for videos tagged "Creative Commons." There are hundreds of pages of video to choose from.

Editing Programs

There are many video editing programs on the market today. Adobe Premiere and its easier-to-use cousin, Adobe Premiere Elements, are always a good choice in editing programs, and they're not terribly expensive. A serious editor might also check out Final Cut. If you're looking for other alternatives, you can look at these:

- Lightworks. Lightworks is an excellent program, free to everyone even though it's been used to edit feature films like *The King's Speech* and *Road to Perdition*. They likely used the Pro license, which comes with a price tag, but the free version will allow you to do a lot of basic and even professional editing. In fact, it won an editing and technology Emmy Award in 2018.
- Shotcut. Shotcut is a free, open source video editor that works pretty well as far as basic editing goes. It may be challenging to learn up front, but there are many tutorials on YouTube. If you want to produce something that looks really good without buying an editing program, then it's worth the effort of conquering the learning curve with this program.
- Rawshorts. Rawshorts is an animation program. If you have no drawing skills and you think that your message is best delivered in animated form, check out Rawshorts.

ACCESSIBLE VISUAL AIDS

What you'll learn to do: Identify ways to make information more accessible to your audience

A good communicator will consider their audience when preparing a written communication **and** when choosing the visual media that will accompany it.

In this section we'll take the time learn how to ensure our audience can consume and use visual aids, no matter their physical abilities.

LEARNING OUTCOMES

- Discuss the importance of making your media accessible to the widest audience possible
- Identify techniques and tools to make visual media more accessible to your audience

When giving a presentation or writing an email you are always trying to convey a specific message to your audience; not just a portion of your audience—all of your audience. Your audience will consist of individuals who might have a variety of needs and abilities. The best way to reach the widest audience possible is by thinking inclusively and creating accessible visual media.

PRACTICE QUESTION

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Accessibility means different things to different people, and an effective communicator strives to create documents and presentations that are usable by people with the widest possible range of abilities, operating within the widest possible range of situations. This means making things accessible to all people (whether they have a disability or not).

To be inclusive of all audiences, it is important to keep in mind any factors that could pose as a barrier to understanding the message. Individuals in your audience may have auditory, cognitive, neurological, physical, speech, or visual disabilities or special needs that could adversely impact their comprehension of a message (we will discuss disabilities in Module 13: Social Diversity in the Workplace). Accessibility also benefits people *without* disabilities, for example:

- Older people with changing abilities due to aging
- People with "temporary disabilities" such as a broken leg or lost glasses

- People with “situational limitations” such as trying to read in bright sunlight, external noise such as music or a continuous car alarm, or in an environment where they cannot listen to audio

Guidelines for Making Media Accessible

The first step to making your media accessible is to assess its **purpose** or **value** to your presentation or written message.

Consider the following questions:

1. Does your image or video serve a **functional** purpose? In other words, is it conveying non-text content to the audience? If so, you should:
    - Provide a text alternative that serves the equivalent purpose of the non-text material
    - Not use color as the only visual means of conveying information
2. Does your image serve more of a **decorative** purpose? In other words, is it primarily a design element that does not convey content? If so, you should avoid unnecessary text descriptions.

When putting a presentation together consider what your content page would look like if the images didn’t load or someone was too far away to see specific details. One way to reduce losing information or alienating an audience member is to write alternative text for each image, which would work as a replacement and provide the same service as the image. For guidelines on writing alternative text, visit this link on Images from the Accessibility Toolkit.

Another thing to consider when using visual media is what your images would look like if they displayed only in black and white. Would any necessary context or content be lost if the color was “turned off”? For example, have you ever used a black and white laser printer to print a web page? Many details of the images or text are easily lost, and that can affect how your reader interprets your data and whether they can understand the point you are trying to make. Images should not rely on color to convey information, so you must design that PowerPoint slide or image page to work in black and white, otherwise you’ll lose your audience if they can’t view it in color. If the point you are making depends on color to be understood, you may need to edit your image or formatting so that concepts presented are not lost to those who are color blind or who require high contrast between colors. Your text should also not rely solely on color to make distinctions—use bold, italics, underline or a different font to highlight the important information.

Tools for Accessibility

Including visual media in your presentations, emails, or professional training materials can help engage the audience and help them understand the message more efficiently. Yet visual media, if not presented in conjunction with accessibility techniques and tools, can do the exact opposite and can instead alienate audience members with visual, hearing, or cognitive disabilities. Visual media, such as graphs, charts, photographs, videos, or instructional diagrams, that do not take the needs of impaired individuals into consideration, might deny users with disabilities the opportunity to really understand and feel what you’re saying.

Screen readers, refreshable Braille displays and closed captioning tools are among the digital tools out there today that assist those with disabilities. When choosing visual media, a good communicator should keep in mind how their materials will be understood by people with disabilities.

Images, Tables, Charts and Alt-Text

Images, tables and charts can be particularly challenging for sight-impaired audience members. A screen reader is a tool that will read the alt-text included with any visual media. A downside is that a screen reader can only read the verbiage provided, it cannot interpret the visual media on its own. Charts are notorious for having very limited alt-text descriptors. In the video example below the screen reader does not see an X-axis or a Y-axis. The screen reader does not recognize the numbers or data represented in a graph if they’re not included as text. It will not recognize trends or provide any kind analysis. Captioning the chart can help get to the underlying point, but it certainly doesn’t allow the sight-impaired audience member to study the data and arrive at a conclusion.

WATCH IT

Watch this video to experience a screen reader ineffectively describing charts and graphs that have not been made accessible. Unfortunately, this is a typical experience for a screen reader user:

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Video

Often, our hearing impaired audience members need additional assistance in comprehending what's going on in a video. Voice-over narration and music are among the things that convey information and feeling to a hearing audience member but will go undetected by the hearing impaired.

Captioning is the first and most obvious way a communicator can make sure a hearing impaired audience member understands a video. It can also benefit a non-native speaker, a viewer who has trouble understanding the dialect or accent of a speaker, or even just a viewer watching the video in a noisy environment.

There are vendors that provide video captioning services. The National Association of the Deaf provides a comprehensive list of vendors who will caption videos. However, a communicator with video editing software and a little bit of savvy can do it on their own. Some captioning standards to keep in mind:

- Captioning should not exceed three lines of text at a time
- Captioning should be synchronized with the spoken word–no faster or slower
- Captions should not cover up text or other important information on the video
- Captions should identify who is speaking when multiple speakers are present (as in an interview)
- Captions should use a sans-serif font such as Arial or Calibri
- Non-speech sounds should be indicated with brackets, like [applause]

Transcripts of videos can also provide hearing-impaired audience members with more accessible information from your video. One tool for creating a quick transcript of your video is to upload your video to YouTube and use its auto-generated subtitles. See the following video for a tutorial on how to use this free feature.

WATCH IT

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PRACTICE QUESTION

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USING VISUALS

What you'll learn to do: Incorporating meaningful visual media in business messages

We've already learned what a great visual looks like: it's clear, clean and simple, uniform, persuasive and on brand. We know we have graphs, charts, images, and even video at our fingertips, all great tools to help us communicate our story. Now, all we need to do is incorporate these visuals into our various methods of communication and let them get to work!

This section will explore how visual media and text relate to one another, how to evaluate effectiveness, and how to reexamine the visual media you're using when it doesn't work. We'll look at how businesses use visual media in their reports, presentations, speeches, and other documents. We'll review several examples and judge whether their visuals were used correctly and, if not, what they could have done better.

LEARNING OUTCOME

- Identify appropriate and professional visual representations of information for a business report
- Identify effective use of visual media in presentations, documents, spreadsheets, and messages
- Describe the process of revising and enhancing visual media to create impact
- Evaluate the effectiveness of a message

Visuals in a Report

Reports don't end in high school, unfortunately. In fact, businesses that are publicly traded usually prepare an annual report each year for their stockholders and investors. That annual report might be a hundred or more pages of highly detailed information, including strategic plans and financial data, and will certainly include visuals.

PRACTICE QUESTION

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Let's take a look at a few annual reports from well-known companies. We're going to study what they've written, the visual media they've chosen to use to support their written word, and if that choice of visual media meets our visual media standards of clarity, consistency, relevancy and persuasion.

NESTLE GLOBAL: IMAGES IN REPORTS

Nestle is the world's largest food and beverage company, and their mission of "Good Food, Good Life" is to provide consumers with the best tasting, most nutritious choices in a wide range of food and beverage categories and eating occasions, from morning to night.

The cover of their 2017 Annual Review is subtitled, "Nestle. Enhancing quality of life and contributing to a healthier future." Do the images they choose convey that idea? Here are examples from several pages of the report:

Are these images clean, clear, and simple? They are simple images, with very little to look at except the young people or the products themselves, so we can say they are clean, clear, and simple.

Are they uniform? The two larger shots feature the children shot from about the knees up, with only a small amount of background around them. The smaller group of four images on the middle page feature three products shot at about the same distance, with similar shot compositions (the product and other items used with that product). The fourth picture breaks that pattern–and draws your attention–by showing some young people enjoying a fourth product. Finally, all four images are square with two curved corners on the right and 90 degree corners on the left. These images are consistent and uniform.

Are they on brand and relevant? These images show a series of products and happy young people. If they're trying to convey a good quality of life, they seem to have done so. These children are well dressed, playing sports, enjoying the benefits of friendship. And the fact that these subjects are all young people drives home the idea that Nestle is contributing to the future. So we can say these images are relevant and on brand.

Are they persuasive? We can decide that by measuring how the image supports the message in the text. Let's look at the first one, "Our Strategy." The text says,

> Through enhancing quality of life and contributing to a healthier future, we aim to deliver sustainable, industry leading financial performance and earn trust…

In the photo we see two young girls, a symbol of our future. They're worry free and having a great time. One of them is carrying a Nestle product. Does the image help us feel what Nestle is saying in the text? Yes. This image is persuasive.

The second large photo talks about innovation for a changing world. The text reads,

> At Nestle, continuous innovation is part of our DNA. Our success is founded on over 150 years of anticipating trends and understanding consumers' needs.

Here again, the future is represented by two young people enjoying a healthy lifestyle of sports and sampling a Nestle product. They're looking at a cell phone, a symbol of modern innovation. Does this image help us feel what Nestle is saying in the text? Yes.

Nestle does an excellent job of incorporating images into their reports.

TARGET: CHARTS, GRAPHS AND TABLES

"Expect more. Pay less." That's Target's brand promise to its customers. Target is one of the most identifiable brands in the world, and you don't need to look past the cover of Target's 2016 annual report to know exactly what it is and who made it.

Let's take a look page 2 of their report to see how their clean, crisp style is translated into their report's charts and graphs.

The first set of charts shows their financial highlights in a set of four bar graphs that compare five years of sales, EBIT (that's 'earnings before interest and taxes'), net earnings, and diluted EPS (that's 'earnings per share'). The chart is simply labeled, captioned appropriately with earnings and CAGR (that's 'compound annual growth rate'). You can see at a glance that Target's 2016 wasn't quite as profitable as the prior four years. And according to the footnote at the bottom, that's because of the pharmacy sale to CVS.

The second set of charts shows their total segment sales. They've chosen a composition chart to display this information, because they're showing what portion of total sales each department has contributed. Notice that this is actually one pie chart shown five times, each with a different department highlighted.

- **Are these charts clean, clear, and simple?** Very much so. They feature only the information we need to see. The font they chose is easy to read, and the colors stand out.
- **Are they uniform?** Definitely. The styles of the bar charts and the pie charts are the same size, they use the same colors.
- **Are they on brand and relevant?** Most certainly. Target has used their brand colors, they've maintained their clean, crisp style, and their pie charts are the outside ring of the bulls eye. The information is relevant in that, here on page two of the report, they've shown you all the financial data that 90% of readers open the report to find.
- **Are they persuasive?** Yes. This is a display of information, and because it's captioned and footnoted, there's no reason to question it. But where did these numbers come from, and how did they determine

which ones to show in the graph? As it turns out, a more in-depth look at their financials is featured on a table on page 4.

All of the information in the financial highlights bar charts on page 2 is featured here in this table, too. This table, which is on brand with its easy to read font and its Target red headers, allows the audience to dig in and really understand the numbers they saw on page 2 of the report. Again, this table follows our visual media standards in that it's clear, consistent, relevant and persuasive.

Target does an excellent job incorporating charts, graphs and tables into its reports.

MICROSOFT: VIDEO

Technology giant Microsoft's mission is to empower every person and every business on the planet to achieve more. Their 2017 annual report is online, and because that communication method is so flexible, it allows them to include video right in their letter to shareholders.

The letter opens with a reminder of their mission and proceeds to highlight a variety of businesses, from Boeing to Land o' Lakes to Case Western Reserve University and the Cleveland Clinic. Please try to watch at least three of these videos—they're less than a minute each.

Did you see a few of them? Okay, let's determine if these videos fit in with our visual media standards.

- **Were they uniform?** Each of the videos starts with a picture of the planet and then zooms in on an area. From there, you get a series of visuals that show people interacting with Microsoft products to achieve innovative results. The uniformity of these videos is actually the foundation of their communication effectiveness. Every other element falls in place because of it.
- **Were they clear and simple?** Yes. Videos add a level of complexity by their very nature–there's so much to see! The uniformity of these videos adds an element of predictability, so by the second one, you know right away what to expect and what to look for. That makes the video simple. Add to that the simple audio; no verbal communication is added to these videos, it's just a series of visuals.
- **Were they on brand?** The first image of the planet, followed by the zoom in to the people and businesses using their product, is a visual translation of their mission statement: to empower every person and every business on the planet to achieve more. Their technology is featured throughout, and each video ends with a logo. This is very much on brand and relevant.
- **Were they persuasive?** Absolutely. They visited companies all over the world and showed us amazing things without using one spoken word. Planes were built. Human lives were saved. They have delivered a lot of emotional punch with this series of videos.

Microsoft made terrific use of video in their report and incorporated it very skillfully with the text.

Increasing Impact with Media

Speakers don't need visual media to make a point. Just watch any stand-up comedian, and you'll see that an engaging message can be delivered with nothing but a good story and a funny punchline.

Still, Microsoft PowerPoint and Apple Keynote offer speakers the opportunity to reinforce their messages visually, and, done right, this can have a powerful impact. Still, often, PowerPoint presentations are not done as well as they could be. We'll learn more about making effective slide decks in Module 8: Developing and Delivering Business Presentations.

THE POWERPOINT MYTH

If you Google "PowerPoint bad," you get over ninety million results. It's been fashionable for a while to bash presentation software—especially PowerPoint—as stultifying or boring. But as anyone who's seen the classroom scene in *Ferris Bueller's Day Off* knows, bad presentations didn't start with PowerPoint.

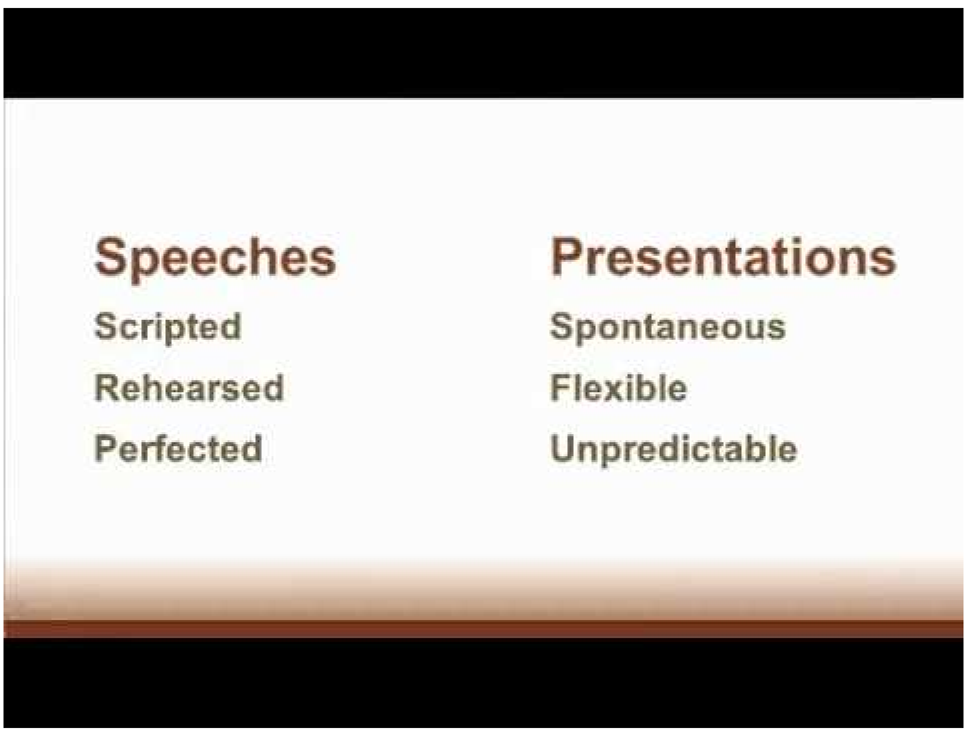
If you try to pound a nail in with the claw side of a hammer—or worse yet, with the handle of a screwdriver—do you blame the tool? No, of course not. Blaming PowerPoint for dull presentations and even duller presenters doesn't get at the core issue. Even when the software could practically construct the presentation for you, you still need to focus on the best ways to present **your** message to **your** audience in the most effective way possible, including relevant visuals as needed.

There are a few key things to remember when creating visuals that you're going to use to present to an audience. If you work on formulating satisfying answers and goals, your presentation should be effective and persuasive.

Everything we've discussed up to now about audience analysis and honing your message applies to the process of creating visuals for your spoken presentations. In addition, you will want to keep two other key points in mind:

1. Unlike the exchange between audience and recipient that happens with an email or report, presentations happen in real time, so you want to be respectful of your audience's time and not waste it.
2. The best thing that can be said about a business presentation is that it was effective and helped everyone in the room do their work. If after the presentation, people are talking about how gorgeous your slides are or how funny you were, rather than about the topic of your presentation, you might not have been focused on the important aspects of your task.

One more critical question to ask yourself is this: are you delivering a speech or giving a business presentation?



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If you are giving a speech—where you expect no back-and-forth conversation with your audience—then you probably don't need visuals at all. Obviously, if you're giving a speech about the details of an ancient Roman sculpture, it helps to show a picture, but speeches are scripted and rehearsed, so you don't absolutely need words or images on your screen for you or for your audience. We'll talk more about speeches in Module 7: Public Speaking.

If you are giving a business presentation, you might need visuals to help both you and your audience stay on track. There are a few rules for this that we can sketch out here, so you'll be prepared for Module 8.

- A brief agenda slide lets the audience know you have a plan in mind. Give them a sense of the big chunks of information you're going to cover so they trust you with their time and believe you know what you're talking about. Deliver the agenda quickly and resist the temptation to elaborate on it. That's what the rest of your presentation is for. Delivering a slide like the one below should take no more than thirty seconds.

- Using images to convey your message can be really effective, especially if the images apply to your content, such as charts, graphs, and pictures of products or displays. Keep in mind that . . .
    - Simple is good. If you need to present only a few data points from a graph that has several, delete or gray out the ones you don't need in order to help your audience focus on what's important.
    - Pictures should be well-edited and as sharp as possible. If you need to show a detail from a larger picture, edit down to the detail you need and show that. Your audience will mentally check-out if they can't see or follow what you're talking about.
    - A descriptive slide title helps remind your audience of what they're looking at. If an audience member zones out while you introduce the slide, without a slide title, they'll be lost when they come back into focus.
    - Pictures are great for eliciting emotion *if that's what you want to do.* A discussion of how good customer service changed the life of one of your customers is expected to get an emotional response, so use pictures of the customer, of their letter to management, or other images that will get at the emotion you want to generate. However, when you're simply presenting a quarterly earnings report, emotion-generating pictures will be perceived as confusing or manipulative. This doesn't mean you can't have strong feelings about a strong quarter. It just means that the feeling will come through in how you deliver your message rather than through pictures.
- Your slides are for you as well as for your audience. This means that they should help you stay on track and remind you of what you want to say. Therefore,
    - Ignore those who say you shouldn't read your slides. The words you put on a slide should be so brief that your audience doesn't even notice you're reading them. Rather, what's on the slide will remind you of what you want to talk about in detail. As soon as you turn away from the slide and re-engage with your audience to elaborate on your point, they will be there with

you—focused and learning. Watch the video following this list for a good explanation of how to read what's on your slides without losing your audience.
  - Putting on your slides the few words you need to stay on track eliminates the need for notes. More than anything, notes get in the way of engaging with your audience and staying on track. Presenters who use notes tend to either get mesmerized by them (especially if they're on a small screen like a laptop or tablet) or they try to toggle between their notes and their audience, which is at best an awkward kind of yo-yoing act that steals focus from the point you're trying to make.
  - Remember, there is no award given for the longest presentation given with the fewest slides. It is loads better to make more slides with less on each of them. It helps you stay on track, and it gives your audience something new to focus on more frequently.

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Remember the visual media standards when choosing your supporting images, charts, and video. Images should be very simple and clear, they should still be uniform, and they should support your company's brand and be relevant to the points the speaker is trying to make. Most importantly, they should be effective and persuasive. There's no better way to educate and persuade your audience than to be right in front of them.

If you are going to include images in a file to be sent electronically—a Word doc, a PowerPoint, or even an email—there are a few things to keep in mind. First of all, image files can be so large that they slow down the speed at which your document downloads and/or opens. This can be really annoying for your recipient, especially if they're working on a phone or tablet and using up their data allowance. Sometimes, these files won't even arrive because the system can't handle them. There is a lot of information online about how to reduce image file sizes. Also keep in mind that if your recipient is reading your report or message on a small screen like a tablet or phone, the actual photo dimensions matter. In Module 8: Developing and Delivering Business Presentations, you can find information on how to resize images. Finally, since images can cause some technical trouble, include them in your documents only if they are necessary to support the points you are making. If they're merely decorative, delete.

PRACTICE QUESTION

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Revising and Enhancing Visual Media for Impact

During the development of a visual aid, the author will review, change, or amend the visual as a part of the revision process. The end product can benefit from the author's taking the time to pause to analyze whether the visual aid is aligned with the purpose of the message she is trying to convey. This includes the visual aid accommodating the audience's needs and characteristics and providing a persuasive conclusion. The revision process allows for the fine tuning of a draft (or completed project) that will enhance your visual media and ensure the message reaches the intended audience. When revisiting a visual aid, remember the four visual media standards we have explored in this module: Is it clear and simple? Is it consistent and uniform? Is it relevant and on brand? Is it persuasive?

Figure 1. Simple and clear visuals can help you communicate complex ideas

The revision stage is a prime time to receive feedback from someone less familiar with what you have been working on tor receive an outside viewpoint.

PRACTICE QUESTION

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Feedback is an important and inevitable part of work, and it comes from the people around you: supervisors, peers, and customers. At some point in your communication career, someone is going to point out some image or graph you chose (or made) say: "I don't like this," "I don't understand this," or "This doesn't match our message."

Whether you are in the development phase or a visual aid has already been published, hearing feedback like this can be frustrating and feel dismissive after spending time and effort on creating a visual aid. If a colleague doesn't like your choice of image or graph, this doesn't mean your choice was wrong. Do not despair because this is an opportunity to make a better visual aid. Asking the right questions to clarify what is missing from your visual aid allows you to use this feedback to revise your visual and potentially communicate your message more successfully to your audience.

When feedback points to how a visual aid isn't working with the text, be curious, not defensive. It is tempting to become defensive or "explain away" the criticism, but resist this natural reflex. Do not debate or try to explain your behavior. Instead, let the other person finish completely and try to listen deeply. Then ask questions with the intent of inquiry:

- If you had to make two suggestions for improving my work, what would they be?
- Do the colors, alignment, or content of the image add or distract from the message or text?

- Is there something confusing or that could be done differently in this visual aid?
- How eye catching or engaging is the visual aid?
- Is it interactive, original, funny, or interesting?
- What is something that works well in this visual aid?
- Which parts of the visual aid are successful unsuccessful and why?

Request examples of what they think a good visual is. Stay curious until you can see how they reached their opinions—even if you don't completely agree. Later, you can decide what you agree or disagree with, but for now, your goal is simply to learn. Reflect thoughtfully on what you've heard.

Just as getting someone to read your writing can make your writing better, getting someone to look at your visual aids will help you create a better product. Asking someone to look over your slides, listen to your presentation, or watch a video you created can seem scary, but mistakes and feedback as *opportunities to grow*, rather than personal failures. Seeing feedback as an opportunity is referred to as a **growth mindset**. Criticism is not an attack on you as a person. It is about something you did. You can't change who you are, but you *can* change what you do.

ADDITIONAL RESOURCES

- How to give and receive feedback in an agile organization
- Feedback for Teams
- Presenting with Sensory Enhancements

Evaluating the Effectiveness of your Message

If only this were easy! A communicator can produce messages all day long, but they are not effective unless the audience receives them, consumes them, understands them, and (if applicable) provides the requested response.

Trying to pin down evaluative data like that is similar to your cat trying to catch the spot of light generated by a laser pointer. But you can actually gain some understanding through data collection with the right tools.

- **Did the audience receive the message sent?** Companies like ContactMonkey or Politemail provide email tracking services to help a communicator determine how many of your readers opened your message. If you use a collaborative intranet platform to share your messages, a web tracking program like Google Analytics can give you myriad insights as to who is "landing" on your message.
- **Did the audience consume any of the message?** If your message is encouraging a reader to click through to a video or webpage, this can help you understand better if the reader engaged with the content. How many readers clicked through to watch the video?
- **Did the audience understand the message?** This is where it gets dicey. Certainly if you've requested a behavior of your audience and they've responded accordingly, then you know your message was understood. For instance, if you requested that customers update their passwords, you can tell how many audience members understood the message by measuring how many customers changed their passwords. However, if your message was about company strategy, about strengthening employee engagement, or about increasing customer confidence in the company, it's not as easy to gauge the effectiveness of these more nebulous messages. Long-term, you're likely to see the results of these messages (whether positive or negative), but you likely want to know relatively quickly if your message was successful. You can use tools like surveys to determine if you're on the right track.

PRACTICE QUESTION

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PUTTING IT TOGETHER: VISUAL MEDIA

Statistics from different professional fields tell us that visuals support and can even improve communication—that's a compelling reason to use visual media in all your communication. Visual media makes your message more accessible. It helps your audience process the information faster, it can even transcend cultural and language differences. With visual media, your reach is wider and your message more powerful.

You have some different kinds of visual media to choose from:

- Images
- Charts
- Graphs
- Tables
- Video

And you have some uncomplicated standards by which to select just the right type to make your message more accessible:

- Clear, clean and simple
- Consistent and uniform
- Relevant and on brand
- Persuasive

Now it's time to put all of these tools to work for you.

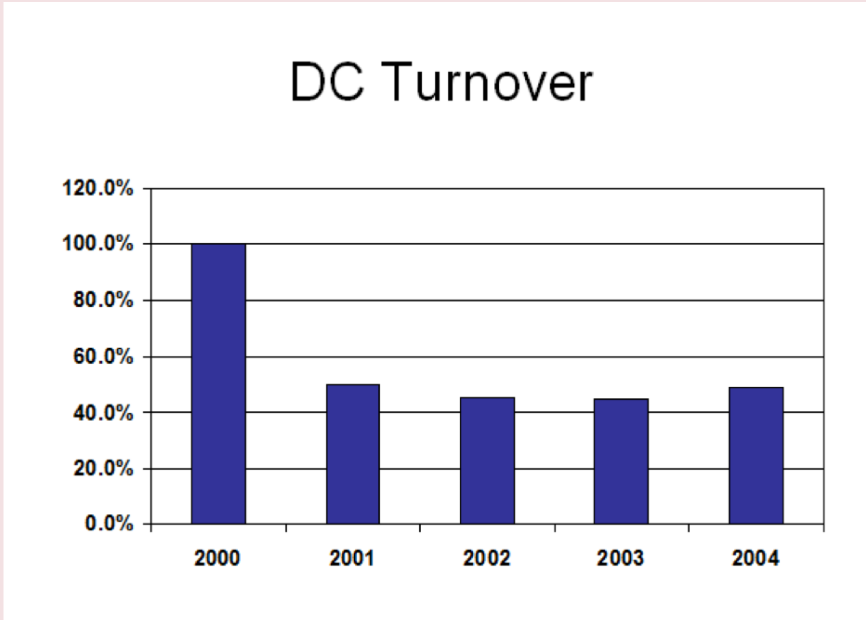
REDUCING TURNOVER

Imagine that your human resources department is celebrating the fact that they have curbed the high turnover rate in your distribution center. Once at almost 100 percent employee turnover, they've been under 50 percent for the last three years. It's time to report to the board of directors how the HR team is doing, and this should be a part of their success story.

In your report you write, "The HR department is pleased to report that turnover has been under 50 percent for the last three years after significant development of items to create value of employment."

But on it's own, this statement seems very flat and one dimensional. To emphasize this amazing success story, you decide to add a chart like this to support the message and give it more impact.

Leverage visual media to tell your story in the most memorable, impactful way possible.


DC Turnover
120.0%
100.0%
80.0%
60.0%
40.0%
20.0%
0.0%
2000
2001
2002
2003
2004

MODULE 6: REPORTS

WHY IT MATTERS: REPORTS

Why learn to write business reports?

You've just come home from your day at work as a produce manager at a local grocery store. As you sort through your mail (bills to pay, items to read later, and junk to recycle now), you come across postcards from two different meal kit services, where they send a box of ingredients with recipes to homes. The home cook then follows a recipe for a unique meal with a few special ingredients without having to go to the store for anything.

When you go in to work the next day, you plan to ask the owner about these services. How hard would it be to package something just like that in this store?

The owner of the store thinks your idea has some merit, but isn't sure how many customers might try it, what they would be willing to pay, or how much it might cost for a simple store in a small town like this. He asks you to put together some information that lays all of this out. He wants to think about it and review it with a couple of business friends that he bounces new store ideas off of.

This is your first time to use a business report in a real life business circumstance, not a school assignment. You start to do what you were trained to do in thinking about this report as an internal proposal. The first step is to set up the exact item or problem statement to research. With that, you can do the research needed to answer the questions and determine how to share your results in an orderly fashion.

BUSINESS REPORTS

What you'll learn to do: Discuss the different types of reports and their purposes

Employees in most organizations create and use reports; however, it's important to remember that the business report is a markedly different document than a report created in an academic setting.

Reports are a key communication tool in business; they effectively share and retain information and decisions. Reports are classified into two main types: informal reports and formal reports. Both of those classifications are further broken down by type of information. This module describes these report structures and types. In this module, you'll learn the following:

- Which type of report to use and when
- What sections may be found in each type of report
- How to format reports

A report that is laid out well facilitates the reader's understanding of its content. With a clear function and purpose, a well-formatted report establishes the credibility and professional abilities of the report's creator.

LEARNING OUTCOMES

- Distinguish between informal and formal reports
- Distinguish between informational and analytical reports
- Compare and contrast different type of stakeholders in business reports

Informal versus Formal Reports

While there is no single difference between informal and formal reports, we can typically distinguish between the two based on their length and sections.

Some say the wording and phrasing changes between informal reports and formal reports from more conversational to more formal. Writing issues such as those are explored throughout this module. Specifics of wording and phrasing vary by company and by type of report. In any case, authors must remember their reports enhance their image and credibility in the workplace. The accuracy of each report, the professionalism in the layout, and the clarity of the writing all reflect the writer's reliability, validity, and full comprehension of the proposed solutions. Essentially, you should focus on simple, clear phrasing and organization. Focus on how to make the full meaning easiest to grasp for the audience.

Informal Reports

Informal reports tend to be shorter, although the quantity of pages or words is not defined. Think of informal reports as documents of under ten pages. An informal report usually has specific topics grouped in paragraphs, and these topics tend to have simple headings. Note that while informal reports often don't have required headings, you can take inspiration from the headings required in formal reports.

Formal Reports

A **formal report** tends to be longer; although, again, the quantity of pages or words is not defined. It may start at ten pages and in some cases exceed one hundred pages. With a formal report, the topic of the report or the policy of the company it's being written for determines which sections, labels, content, and purpose should be used as the basis for the report. These reports address complex topics that require substantial description of background, research on the topic, and evidence to support any proposed solutions. Both the data gathering and the summary of the topic generate length. To keep this abundance of information organized, the report requires formal headings and tight organization in order to help the reader stay on track.

PRACTICE QUESTION

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Informational versus Analytical Reports

Now that we've defined the difference between informal reports and formal reports, let's dive in a little deeper. Informal reports and formal reports have two major categories: informational and analytical reports. It's important to keep in mind that both informal and formal reports can fall into these categories (i.e., you can have an informal informational report or a formal informational report).

Informational Reports

An **informational report** provides a summary of information and data found on a particular topic. One such report is the expense report: this report is a set of information that is used to request allocation of funds. The format is strictly pre-determined and it is often completed at the end of a business trip.

Analytical Reports

The other category of report is an **analytical report**. In this report type, information is researched and collected, then the report provides an analysis that leads to one or more recommendations. For example, consider a report that helps a company determine where to open a new store. The report might look at three properties with respect to road traffic, cost of the land, and adjoining stores, and then recommend the best site from the alternatives.

PRACTICE QUESTION

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Stakeholders

When writing any professional document, it is important to identify the potential stakeholders. A **stakeholder** is anyone who will be affected by the contents of what you write. How you choose to word your document—or even the choice to write the document—can become an ethical matter for stakeholders. It is crucial to consider your main objectives before writing. For example, a report on consumer focus groups that were generally negative toward the company's new ad campaign must take into consideration issues such as how upper management will receive the news and what information will be most helpful to the team working on the campaign moving forward.

According to Paul Anderson, the author of *Technical Communication: A Reader-Centered Approach*, there are three types of stakeholders (Note: Anderson, Paul V. T*echnical Communication: A Reader-Centered Approach*. Mason, OH: Cengage Learning, 2007.):

- Direct
- Indirect
- Remote

The **direct stakeholders** are those initially impacted by what you write. For instance, if you are writing about opening a new waste disposal site, the stakeholders clearly include the company you are writing the report for. However, disposal companies that might use this waste site in the future are also considered direct stakeholders because they will be in the same situation as the current company. Their future business will be impacted based on whether your proposal is accepted or declined.

The **indirect stakeholders** are those that are not impacted until a later time. Using the previous example of the waste disposal site, citizens in the area would be indirect stakeholders. The stakeholders don't necessarily need to be people: the nearby ecosystems would be indirect stakeholders of this same proposal. If toxic waste was dumped there, it would harm the animals, rivers, and plant life nearby.

Finally, the **remote stakeholders** are not affected until far into the future. One example, following our hypothetical waste disposal site, is future generations. While it may seem far-fetched, historically, there have been instances where toxic or poisonous materials have been disposed of incorrectly and the run-off that went into lakes and streams caused birth defects. While this is remote, it must be considered when writing a document. This category of remote stakeholders brings to the forefront one major difference between reports and other types of business communication: reports can have long lifespans and be revisited far into the future.

PRACTICE QUESTION

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INFORMAL REPORTS

What you'll learn to do: Create an informal report

Informal reports in the business setting are usually shorter in length and have fewer sections than a formal report. Employees in most organizations create and use informal reports. Almost all informal reports are for internal use. Some institutions have prescribed formats and others do not. As we've previously discussed, an informal report fits in one of two large categories:

- informational report
- analytical report

An **informational report** provides background and information without reaching an evaluation. These include simple reports like meeting minutes, expense reports, and progress, or status updates. An **analytical report** provides much the same information as the informational report *along with* evaluation or recommendation. These reports may include feasibility studies, justification reports, and proposals.

Most organizations have specific forms and policies for the simplest reports, such as a mileage reimbursement report. Other simple reports are not as restricted.

LEARNING OUTCOMES

- Differentiate among typical types of informal reports
- Discuss different methods of sharing informal reports
- Discuss the purpose of common sections of an informal report
- Determine how to organize an informal report based on audience analysis
- Discuss how to write an informal report

Informal reports are the bread and butter of reports. It is likely that all employees will be responsible for many informal reports over their careers.

Types of Informal Reports

The following are typical types of informal reports. Keep in mind that there may be some overlap with formal reports (i.e., some report types can be informal or formal).

- **Meeting minutes** are a type of informal report that summarizes the discussion and results from a meeting. These reports are informational. They are summaries, not a direct collection of all statements from all attendees.
- **Expense reports** are informal reports that nearly always have a prescribed format. These reports consist primarily of amount of expenditures by type of expense. There is little to no free writing.
- **Status updates** may be internal to a company in addressing a business situation, or they may be external in providing the status of a project to another organization. These reports are short and tightly focused to the purpose. They are informational reports.
- **Trip or conference reports** are used to summarize and transmit learning from a trip or conference. They are informational, and they increase the value of the trip or conference as they share what was learned with others.
- **Proposals** or **feasibility reports** for smaller or simpler projects can also be considered informal reports. These are analytical, as they provide analysis and propose a direction to take.

PRACTICE QUESTION

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Sharing Informal Reports

Informal reports may be delivered in a variety of formats including letters, memos, emails, and digital postings (such as a blog). While your delivery method may impact the format of your report, the writing and purpose will stay the same.

An informal report may be something as simple as a completed standardized form designed by the company; it can also be something more complex, such as an informal proposal. Informal reports may be informational or analytical.

Informal reports may have internal or external audiences. The format of the report should align to the recipient:

- **Memos** are used for internal communication.
- **Letters** are used for for external communication.
- **Web postings** are typically used for external communication, but institutions that have private networks may use these posting for internal communication.
- **Email** may be used for internal or external reports depending upon company policy.

Regardless of the mode of transmission, the structure and content of your report will be based on the type of the report.

PRACTICE QUESTION

Sections of Informal Reports

Informal informational reports typically include the following three sections:

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- Introduction or background
- Support or reasons
- Summary

Informal analytical reports typically include the following four sections:

- Introduction or background
- Support or reasons
- Recommendations
- Conclusion or summary

Introduction or Background

A short section introducing the reader to the "why" of the report. In more complex reports, the introduction may include a background, a problem statement, specific objectives, or all of the above.

Support or Reasons

This is where you'll include your facts, findings, and data. Writers new to reports may make the mistake of providing lists of data and other information found as a result of research. However, most business managers can find the information on their own with time. The purpose of this section of a report is to present a summary of main ideas from the research—it's not simply a collection of raw data.

If more detailed data is needed, an appendix is the most likely place for key selections of raw data.

This section may include the methodology of the research.

Recommendations

This section is only found in analytical reports; it shows how data supports the recommendation given in the report. Essentially, the author connects the logical data items in a way that points to the recommendation.

Remember, the readers are expecting a recommendation with supporting data; they're not expecting to work through all the data on their own.

Conclusion or Summary

This short section wraps up the report and gives a quick summary of the information provided therein.

PRACTICE QUESTION

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Organizing based on Audience Analysis

The logic of report organization is the same as the logic discussed in Module 2 for shorter messages. Reports analyze the audience the same way. The difference lies in the depth of information needed. Thinking about your audience, or the stakeholders, is one of the most crucial considerations when creating a report. It's important to keep in mind that your audience may be broader than you expect (remember the discussion on types of stakeholders from earlier this module): your potential readers have an interest in the report's content for many reasons based on their unique job functions.

To determine which types of sections you should use in your informal report, think about the purpose of the report (these sections can take inspiration from the standardized sections used in formal reports, which we will discuss in-depth later) in relation to your audience.

Organizing Your Report

If your audience is expected to react neutrally or positively to your message, then your conclusion or recommendation should be offered **near the beginning** of the report. Thus, your report would be laid out like this. First you would write the introduction, background, or problem section. Next come your conclusions or recommendations. These are backed up by the support or reasons section, which details facts, data, or findings. The final section is typically some sort of further discussion, analysis, or summary. Remember that introducing these sections with a descriptive heading can help your readers, especially if the sections consist of multiple paragraphs.

If the audience is expected to react negatively to your message, then the conclusion or recommendation is offered **towards the end** of the report. This alternate organization allows the reader to reach a similar conclusion to yours based upon the research and logic offered. Thus, your report would be laid out like this: First you would write your introduction, background, or problem. The next section will be the support or reasons section, which details facts, data, or findings that led you to your conclusion. Next you would include discussion, analysis, or summary. This sections is where the logical or emotional arguments that may influence the reader's understanding are made. Your report then concludes with your conclusions or recommendations. Remember that introducing these sections with a descriptive heading can help your readers, especially if the sections consist of multiple paragraphs.

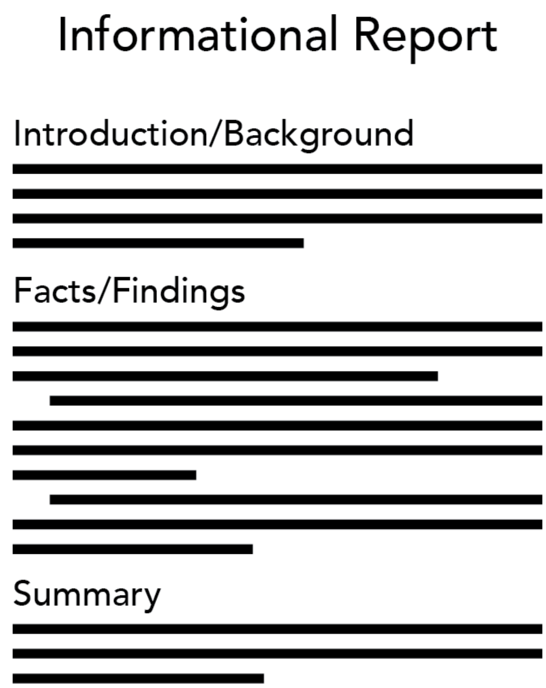

Figure 1. Informational Report Organization

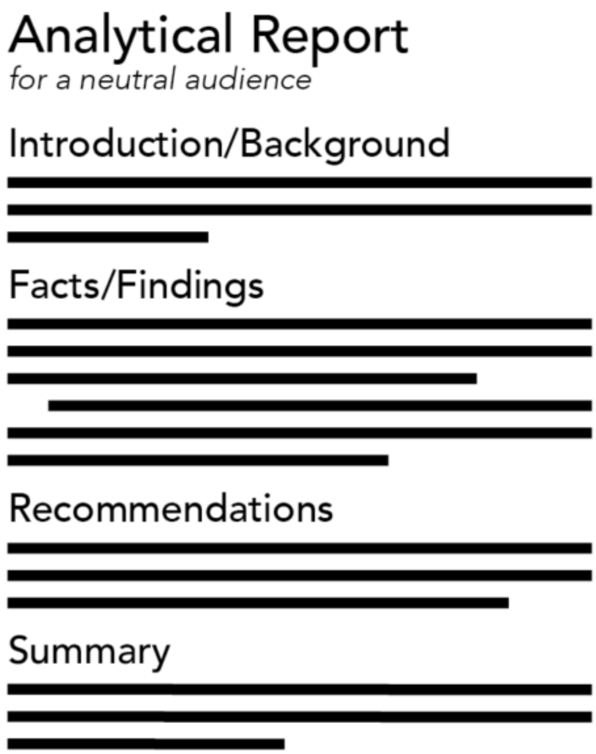

Figure 2. Analytical Report Organization

Formatting the Report

While informal reports may not use extensive or standardized labeling of sections, nor do they have required length of individual sections, each section has a unique purpose. However, these "sections" may be a couple of paragraphs rather than a fully separated section with their own headings. As the report starts to exceed a page or two, headings will provide a tremendous benefit to the reader, and to you, as the reader better understands and retains your main ideas.

A QUICK COMPARISON: USING HEADINGS?

Take a look at these two dummy texts to compare the structure of an informal report without headings and an informal report that uses headings. (Note that these examples only show the formatting of a report, not the ideal way to write one.)

PRACTICE QUESTION

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No Headings	Using Headings
General Store is opening a new location in Q4 of this upcoming year. There are three potential locations for this new store. In my research, I found that location one is in a poorly trafficked area, but is more affordable. Location two is in a highly trafficked area, but is out of the current budget. Location three is just right. After this research, I can conclude that General Store should open its new store at location three.	**Background** General Store is opening a new location in Q4 of this upcoming year. There are three potential locations for this new store. **Findings** Location one is in a poorly trafficked area, but is more affordable. Location two is in a highly trafficked area, but is out of the current budget. Location three is just right. **Recommendation** General Store should open its new store at location three.

Headings can be a useful tool for helping your readers navigate directly to the information they want. Notice that the headings catch your reader's eye much more easily than phrases such as "in my research . . . "

How to Write an Informal Report

Writing informal reports follows the same steps of any other writing task. First is the plan. Second is the writing. Third is the revising.

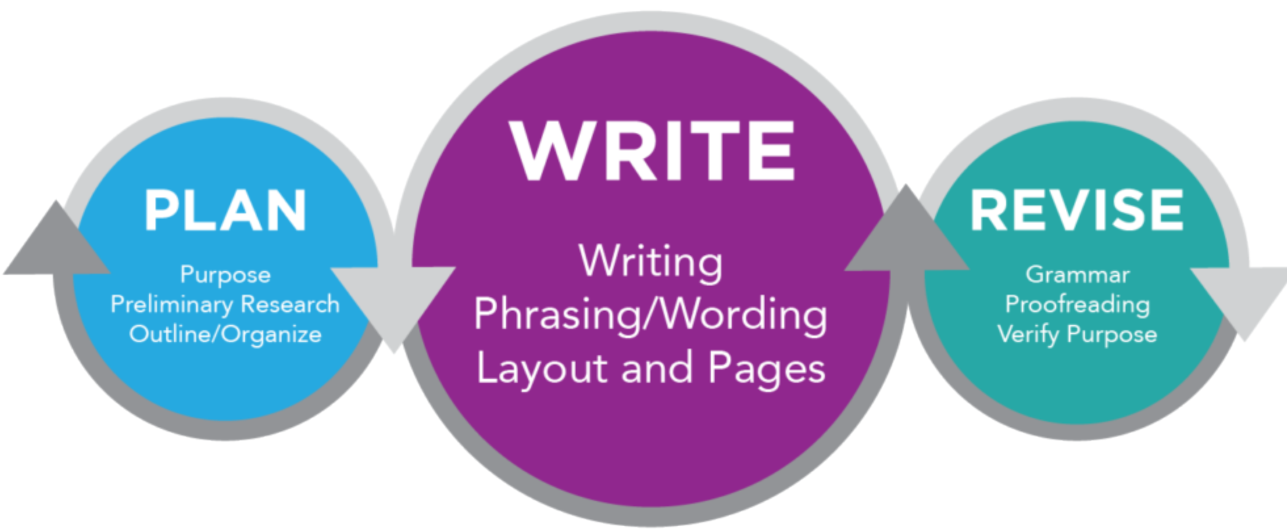


Figure 1.

Planning Your Informal Report

When asked to create an informal report, first check to see if your organization has a form or template that should be used. Then verify your understanding of the report's purpose.

For example, say you are a shift manager at a grocery store, and there has been an increase in customer complaints about fruit that seems to spoil more quickly than it used to. Your store manager has asked you to create a report on this issue. You need to determine whether your manager wants to know causes of fruit spoilage (including items such as time each type of fruit stays fresh from date picked, types of shipping containers, or temperature of storage units), or if your manager wants to know what is happening in the store after the fruit is received (how the fruit is handled, how much fruit can sit on top of other fruit, or temperature in the various storage units). The purpose of a report will impact the amount and type of research to be done.

Next you'll complete any data gathering needed; by the end of the project, you should have more data and knowledge than you started with (and possibly more than you need for the report itself). You'll use that data to create the report's outline. Writers must take care to provide only what is needed for the purpose of the report: avoid wandering to interesting side issues or presenting everything you learned whether or not it's relevant.

In the process of writing a report, or almost any business writing, the planning step should take at minimum 25–30 percent of the time or effort of the full report.

Writing Your Informal Report

With the detailed outline created in the planning process, the actual writing of the informal report should go quickly. In this step, you'll focus on paragraph structure, wording, and phrasing using the lessons found in Module 2: Writing In Business.

Sometimes, writers hear the term "report" and think their writing style must change. What works well for short messages also works well for informal reports. The primary difference is that a report requires a bit more depth to appropriately communicate its message: there are more words and paragraphs, but the words do not need to be longer or more complex sounding. Write with the same skills taught in Module 2: Writing In Business.

WRITING FOR YOUR COMPANY

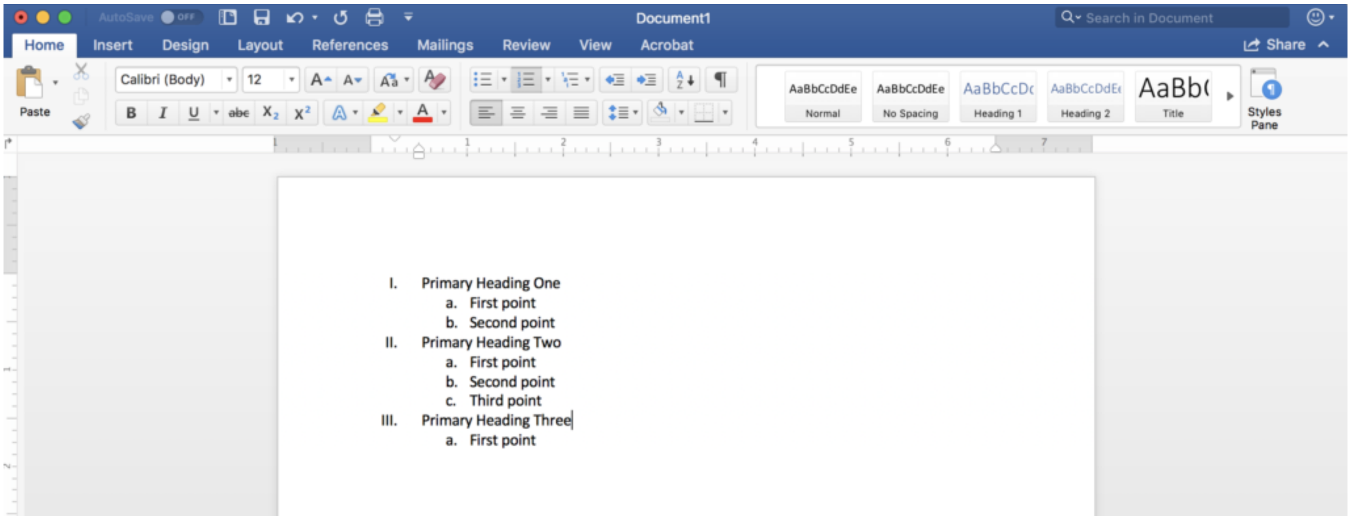
Different companies have different styles for writing reports: you should always match they style of your current institution. Some companies accept a more casual style of writing. This may include the use of personal pronouns such as "I recommend . . . " or "we completed a survey of 20 people." Some companies accept use of contractions as in, "The Customer Contact team couldn't reach a conclusion on types of bags to use," while others do not.

In all cases, remember that a report may be retained for a long time and may be viewed by many readers. With your current credibility and future credibility possibly at stake, it is generally better to be safe by using slightly more professional tone.

Formatting Your Report

In writing your report, remember that headings guide the reader, but like an email subject line, they are no substitute for clear, descriptive writing that helps the reader stay on track. While writing your report, you should use summary statements as each paragraph or section closes to avoid a jerky, disconnected feel in your writing. Ensure that each new section below a header has a good topic sentence that serves as an introduction to the section.

When writing your report, you can take your preexisting outline (from the planning step) and use your word processor's pre-formatted heading styles to create the headings for your report. This provides two benefits: it quickly organizes your report in a pleasing way, and it meets ADA (Americans with Disabilities Act) requirements.



When writing a report, writers often tend to add sections simply because they are “supposed to be there,” rather than focusing on the purpose of each section and how it might support the report.

A stronger writing skill is to look to the type of report and the outline prepared for the writing, then select headers that suit the content, rather than content suiting the header. With informal reports, the style is somewhat relaxed, so headers should focus on making information easy for the reader to access.

When writing a report, or in almost any business writing, the writing step takes about 40–50 percent of the total time or effort for the full report. This may surprise many writers who think that this step is all you need to complete for a report. However, if you spend the time to ensure the planning step is well done, writing goes much more quickly, and you’ll produce a better report.

Revising Your Informal Report

As with most documents, the final step in creating a report is the one most frequently skipped or only partially completed by writers; in fact, writers will often intentionally skip this step, likely because it is at the end of a long process, and they are often eager to submit their work to the requester.

Additionally, their familiarity with the content can lead to them seeing what was intended versus what is actually written. For example, the sentence, “In summary, the store should **now** implement the new plan” can accidentally be typed, “In summary, the store should **not** implement the new plan” to disastrous results. To combat this, you can use word processing proofreading tools, which will catch some spelling errors. Then, no matter how long it takes, read the report aloud. A team member or peer is an excellent additional reviewing tool.

Another way to fail on this step is to read only for proofreading and grammar mistakes. However, revising should also include going back to the original request for the report and back to the original outline to see if the report is directly focused on the planned purpose. Along the way of data gathering and finding new ideas on a topic, there can be some unintentional shift in the focus of the writing. Look to ensure that just the information needed to address the topic is present. Ensure that the primary purpose comes across clearly in your writing.

In the process of writing a report, or almost any business writing, the revising step takes about 25–30 percent of the total time or effort of the full report.

PRACTICE QUESTION

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FORMAL REPORTS

What you'll learn to do: Create a formal report

A formal report in business is closer to the kinds of reports you may have encountered in an academic setting. A formal business report is generally longer than an informal report and contains many specific sections and labels. These sections and labels may come from company policy and practice or be prescribed by the outside organization the report is being sent to.

While you're more likely to encounter informal reports in your day-to-day work, formal reports are used for more complex issues and in more complex circumstances. Formal reports contain detailed information and research. They can be used to address a wide variety of topics, ranging from larger internal problems or proposals to an external client.

LEARNING OUTCOMES

- Define types of formal reports, including proposals
- Discuss different methods of sharing formal reports
- Describe various sections that may be used in the front of a report
- Describe various sections that may be used in the body of a report
- Describe various sections that may be used in the back matter of a report
- Determine how to organize an formal report based on audience analysis
- Discuss how to write a formal report

Formal reports delve much deeper into a topic than an informal report. The label "formal" may intimidate some writers, but the formal report is an extension of business writing. You'll use the same skills in all of your business communications—from the short, limited data email, to the informal report, to the formal report. While you may not need to write a formal report in your career, you will most likely see one and need to understand its components in order to effectively make decisions.

Types of Formal Reports

There are many different kinds of formal reports that you may encounter throughout your career. Here are a few of the more common kinds:

- **Research reports** gather and explain data; these reports are informational. Module 4: Research discusses research methods to obtain the data you'll use in these reports.
- **Proposals** may be internal to a company in addressing a business situation, or they may come from a solicited or unsolicited sales situation. Formal proposals will include details of the proposed solutions and costs.
- **Feasibility reports** are a specific type of analytical report. When an entrepreneur or business manager has a new idea, it is prudent to fully explore the idea before making major investments. Some think of this report as a precursor to developing a full business plan. While a business plan may take many months to develop, a feasibility report can be developed in much less time, and it still provides excellent direction for decision makers.
- **Business plans** are typically informational reports about what a new or existing company plans to do over the next period of time. A business plan may take on a bit more of an analytical tone rather than a strictly informational tone when it is shared with potential investors. In some cases, the business plan may be presented with a request for funds; in those cases, the writing is gently more persuasive.
- **Other complex recommendations** may also come in the form of a formal report. These recommendations result from a business problem that an individual or team has been asked to solve.

PRACTICE QUESTION

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Sharing Formal Reports

Formal reports may have internal or external audiences. Formal reports will be significantly larger than informal reports, and they often include a complex number of references and appendices (in the Back Matter area of the report).

The format of a report aligns to the recipient's needs. Formal reports may be delivered in a variety of formats: documents, letters, digital postings to a website, and so forth. The reader's comprehension is of utmost importance in selecting the delivery method. No user wants to receive an email and then tie up the office printer with a 40-page report. Avoid letting the delivery method hold back the meaning of the report.

Memos are less likely to be used for formal reports, since memos are typically used for short messages, and formal reports are generally lengthy. Letters are for external use, and again perhaps less likely to be used for a document of this type. However, a letter or an email may be used to introduce an accompanying report. Web postings are generally external in nature, but companies may have private networks for internal use. Depending upon the organization, this may be a suitable transmittal method. Remember, just as with informal reports, your delivery method should not change the content or structure of your formal report.

PRACTICE QUESTION

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Sections of Formal Reports

Depending upon the situation and the institution you're working for or writing to, some or all of the following sections may be required in a specific formal report. Some guides to formal reports indicate that specific sections are recommended for each type of formal report. However, smart writers will be sensitive to the organization's requirements or expectations and the needs of the information, then use that knowledge to determine the contents of their report.

The next few pages describe a large number of these section types so you, as a writer, may pick and choose what is appropriate to each situation. It is important to the report's impact and the writer's professional image to understand the purpose of each of these sections.

In a formal report there are three major sections.

1. The **front part** includes sections that come prior to the report itself to establish various items such as authority of the report and intended audience.
2. The **body** of the report has many sections of key information and possible analysis. It is the meat of the report.
3. The **back matter** contains sections of material that support the body.

Take a look at Figure 1 to see an example of the many potential sections in a sales proposal. Since this example models a response to an RFP (request for proposal), these sections were like required by the customer requesting the bid. The white, shaded, white pages related to the broad parts of a formal report. They are illustrative since the author determines specific sections needed based on report purpose company policy, and audience.

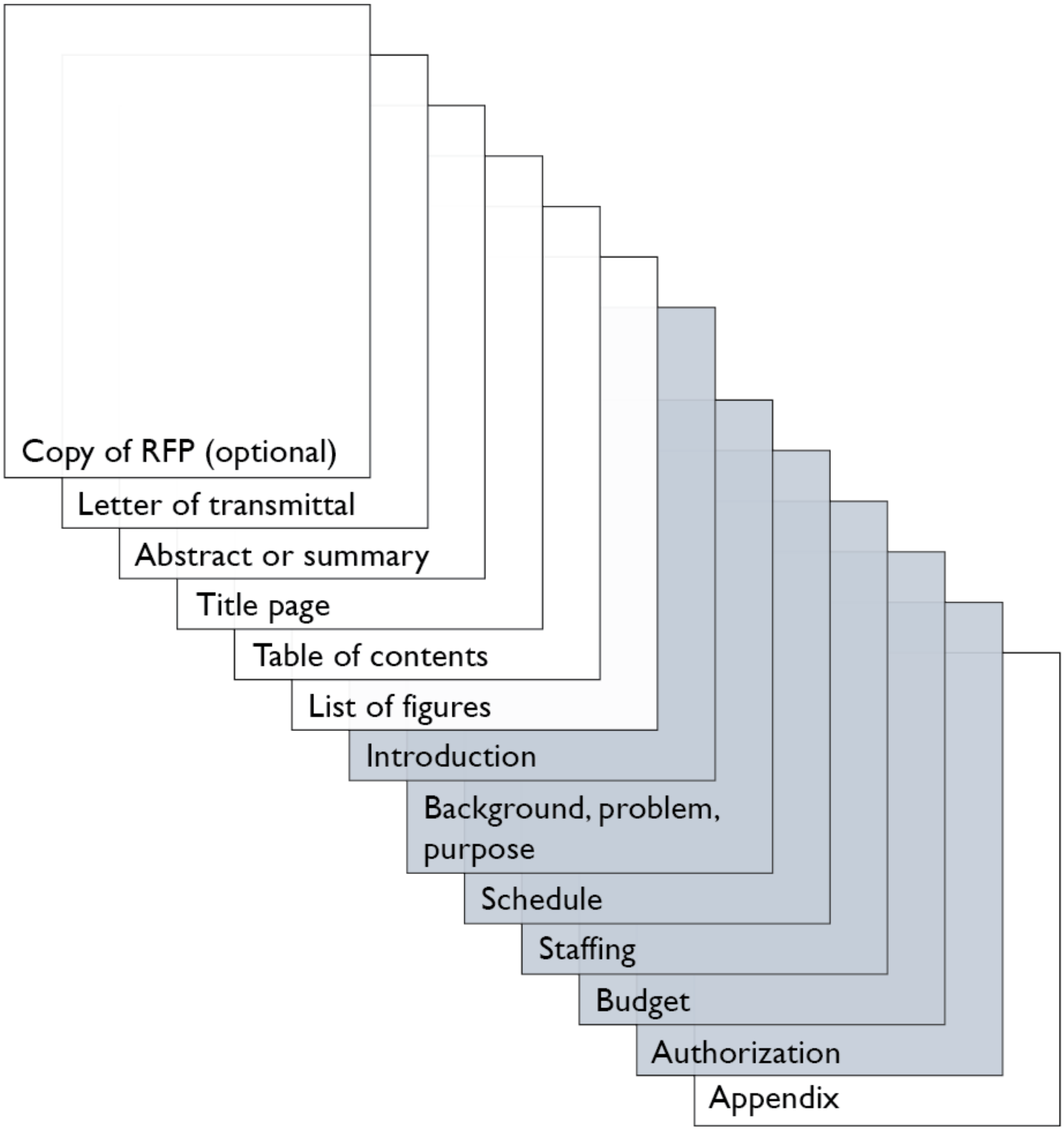

Figure 1. Sections of a Sales Proposal

Front Sections of a Report

In formal reports, you may encounter introductory sections before the actual report itself. These “front sections” are important for establishing context and structure of the report for the reader. In some reports, such as sales situations or proposals, the entire report becomes part of a contract. These front sections aid in that function.

Front sections may include the following:

- Transmittal letter
- Cover page and Title Page
- Table of Contents
- Executive Summary

You will (or not) use these sections based on the context of your report, the information your audience needs, and your company's policies.

Transmittal Letter

A transmittal letter is sent to the company or business leader who requested the report. This letter may be sent separately from the report. This letter can be printed (especially in situations where the report itself is a paper copy), or it can be sent as an email.

This letter describes the need for the report and the date of report completion. The letter includes the background of the project, a reference to the problem analysis, and outlines the procedure used to determine the recommendations presented. It is most frequently used with reports created by one company and submitted to another, such as those associated with a sales situation. This letter can be used in both informational and analytical reports.

This letter should be formatted as a standard business letter (as discussed in Module 2: Writing in Business). It is frequently signed by an officer of the sending company to emphasize the formality of the document and potentially establish legal formality. Pay careful attention to company policy and legal advice. It's also important to note that some companies prefer this same information in another format within the report.

Here is a sample transmittal letter, than can be adjusted to the situation.

> June 25, 2015
>
> Dr. David McMurrey, Chairman
> Energy Experts of Austin
> 2000 W 29th Street
> Austin, TX 78705
>
> Dear Dr. McMurrey:
>
> Attached is the report you requested, entitled *Energy-Efficient Guide: Employing Energy-Efficient Building Strategies in a Residential Home*.
>
> This report is an analysis of a recent study conducted in Ann Arbor, Michigan, on the effectiveness of employing energy-efficient building strategies to minimize energy consumption and costs in a residential home. Using software technologies, the home was modeled to create two scenarios: an energy-efficient home and a standard home. This report details how the study found the energy-efficient home to be both cost efficient and effective at decreasing energy consumption. Such advances might prove to b the catalyst that the housing market needs to spur builders into a new era of home construction.
>
> Thorson James, our solar engineer, carefully double-checked all the technical details in the report. Cherie Sorenson, our technical editor, was of great help in putting the final report together.
>
> I hope this report meets your needs, generated future studies, and educates the public about the environmentally friendly options available in home building today. If you have any further questions, please feel free to contact me at RLMiller@EBA.com.
>
> Sincerely yours,
>
> Gwen L Miller, Vice-President
> Environmental Building Associates, Inc.
>
> Encl. Energy-Efficient Guide: Employing Energy-Efficient Building Strategies in a Residential Home

Cover Page and or Title Page

Almost all formal reports have a Cover or Title Page, perhaps both. These two pages are used in nearly identical ways, yet some report types or organizations require both with a slight modification to the page's purpose.

A cover page is a very simple, precise, brief way to introduce your report to the reader. This should contain:

- A specific title in large font
- Company name

- Name of the author(s)
- Date of the report
- Relevant picture

The use of a relevant picture or two can help reinforce the subject of the report. One goal of the cover page is to be informative and scalable because once it is filed, it will need to be easy to pick out of a stack of other reports. A second goal is to make the report stand out. If the report cover looks bleak and dull, the reader will start reading with a negative outlook. Think of the cover page of a report like the outfit you would wear to an interview. The cover page is the first thing that is seen: it will be the foundation for first impressions, for better or worse.

One easy way to make the report stand out is to use a theme for the report that your audience can connect to. For example, if a report is written to McDonald's, the cover page will use yellows and reds, perhaps with the golden arches as a picture. With a carefully chosen color scheme and images, you can help the reader believe that he or she is the most important aspect of the report. As always, when you include graphics of any kind in a document you are sending out, be sure they don't dramatically increase the file size, which can make the document hard to download, and that they transmit easily among devices and platforms.

The title page is an opportunity to provide more specific, detailed information about the document and its authors to its intended audience. It will be very similar to your front cover and it repeats the information on the cover, but adds more important details. This may include a report number, date, title, the names and addresses of authors, specific contract information, the name and address of the supervisor, and the name and address of the organization that supported the report.

Title pages may be formally laid out according to MLA or APA formatting. However, most business and non-research institutions are relatively relaxed on the format. If you are creating a sales document that may become part of a contract, your company (or your potential customer) will list their particular requirements for the title page. With the power of word processing software, companies have started to use images on these pages as well as on covers. The best advice is usually to keep it simple and professional.These pages may be used with either informational or analytical reports.

Take a look at these examples:

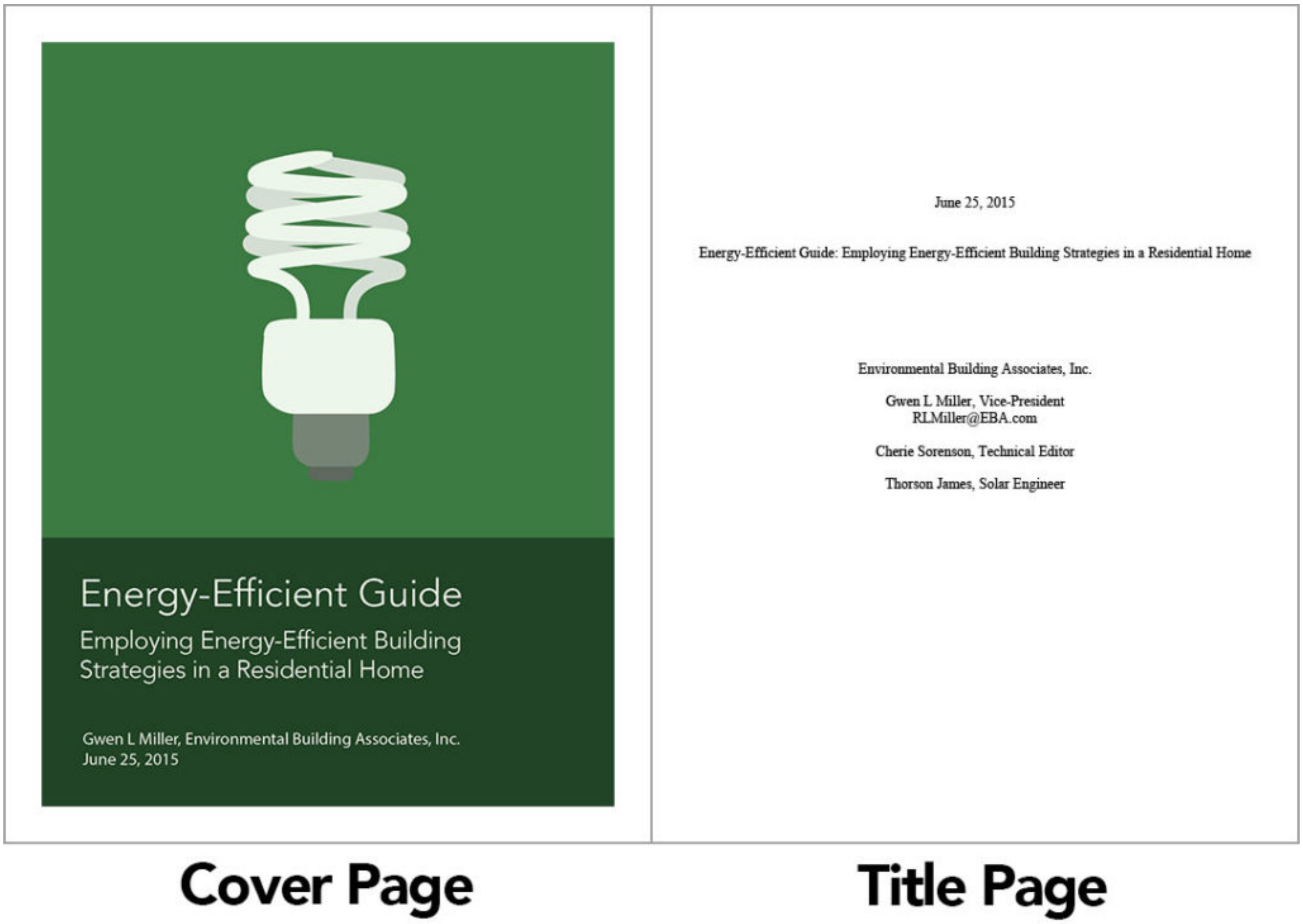

Figure 1. Sample Cover and Title Pages for Energy-Efficient Guide: Employing Energy-Efficient Building Strategies in a Residential Home

Table of Contents, Tables of Exhibits, Tables of Illustrations

Formal reports are frequently lengthy and contain a Table of Contents to assist readers. There may also be tables of exhibits or illustrations if needed. The use of these sections in larger reports allows readers to quickly access the area of their interest: these sections list important headings or figures in the report alongside their corresponding pages. These sections may be used with either Informational or Analytical reports.

Table of Contents

Typically this is one of the last sections of the document to be created, since it relies on the body of the report to be generated. This may be used in either informational or analytical reports.

You're familiar with tables of contents (TOC) but may never have stopped to look at their design. The TOC shows readers what topics are covered in the report, how those topics are discussed (the subtopics), and on which page numbers those sections and subsections start.

In creating a TOC, you have a number of design decisions:

- **Levels of headings to include.** In longer reports, consider only including the top two levels of headings. This keeps the TOC from becoming long and unwieldy. The TOC should provide an at-a-glance way of finding information in the report quickly.
- **Indentation, spacing, and capitalization.** Notice in Figure 2 that items in each of the three levels of headings are aligned with each other and page numbers are right-aligned with each other. Notice also the capitalization: Main chapters or sections are all caps; first-level headings use initial caps on each main word; lower-level sections use initial caps on the first word only.
- **Vertical spacing.** Notice that the first-level sections have extra space above and below, which increases readability.

One final note: Make sure the words in the TOC are the same as they are in the text. As you write and revise, you might change some of the headings—don't forget to change the TOC accordingly.

Contents

Figure 2. Example table of contents. Click to access a PDF of this example.

If you have used specially formatted headings when creating the body of the document, then these tables can be quickly generated by the word processing software. For example, if you use Microsoft Word's styles for headings, the reference toolbar will offer a choice of formats and generate the TOC automatically.

Tables of Exhibits or Illustrations

There may be a few different situations in which you should use additional tables of exhibits or illustrations; for example, these tables may be useful to include if your figures or tables are referred to repeatedly throughout your text. Additionally, as a rule of thumb, you should include a table of exhibits when your report is approximately 15 pages or more. This also allows your readers to flip between exhibits more easily in order to compare them.

Executive Summary

An executive summary is just as the name says: it summarizes all the materials that follow in the report. This section is different from an introduction as it summarizes the entire report, rather than simply introducing it or laying out the structure for the reader. A good way to approach the executive summary is to write it as if the executive or decision maker will *only* read this section, even though that's unlikely to be the case.This section is found in longer reports and is less likely to be found in a shorter report. It can also be used in both informational and analytical reports.

Executive summaries should be written **after** the entire report is completed. This allows the summary to be both comprehensive and well structured. Remember, the investigation and details of the report must be complete and validated before the summary can be written.

This section is offered in paragraph format, with a paragraph summarizing each section in the report; thus, the executive summary is presented in the same order as the report. The executive summary rarely includes images or graphics; however, a table might be offered at the end of this section if the recommendation or options can be easily summarized into a table. In sales or recommendation situations, the executive summary takes on greater importance. It must clearly demonstrate that the analyses in the report are comprehensive and thorough, and it must clearly lead the reader to the author's desired conclusion.

Most importantly, all this must be done with brevity. Most executive summaries are at most two to three pages, but length varies in proportion to the complexity and length of the report.

WHAT ABOUT ABSTRACTS?

An abstract is very similar to an executive summary, although it is far more likely to be found in an informational report than an analytical report. An abstract may help readers determine if the remainder of the document is relevant to their needs. Abstracts tend to be one page or less. Additionally, abstracts are typically used in more scholarly writing, such as business research projects. Samples and and advice on abstracts may be found at Purdue OWL.

PRACTICE QUESTION

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Body Sections of a Report

The body of a report is what comes to mind when most people think of a report; it's the primary content. In this page, we will discuss several sections that are frequently used in formal reports:

- Introduction
- Background
- Purpose (or problem statement)
- Research (or methods)
- Recommendation (or solution)
- Overview of alternative options
- Evaluation
- Benefits
- Qualification
- Management
- Implementations
- Schedule
- Methods of operation
- Costs
- Conclusion

This list may look intimidating, so it's important to keep in mind that this isn't a Table of Contents for *every* formal report. Remember, as the writer, you should use what best suits the material's and organization's requirements. There may be additional sections needed in unique cases.

Introduction

An **introduction** sets up the structure of a report. Essentially, the introduction tells the reader what is to come and in what order, and it reminds the reader of the key criteria that instigated the report's creation. This section is key to the reader following and retaining key points of the report.

Introductions are used in both informational and analytical reports. In an informational report, this helps segment the data that follows. In an analytical report, the introduction helps the reader come to the conclusion the author expects. An introduction is used in all informal reports as well. In an informal report, there may or may not be a separate header with this label, but an introduction must always be present.

Depending upon readers' expected reception of the content, the introduction may foreshadow the conclusion. With receptive audiences, the outcome is clear in the introduction. With less receptive audiences, it is important to present all the facts and research prior to declaring a conclusion; thus, for less respective audiences, it may be better to foreshadow the conclusion than to fully declare it. This allows the reader to end up at the same conclusion as the author as details develop.

The introduction may also include the problem statement or purpose of the report. However, in longer reports, these may end up either in the background or as their own sections.

Background

The **background** section of a report explains the circumstances that led to the report's creation. In some situations, this section may be labeled as **criteria** or **constraints**, or the topic may be briefly addressed in the **transmittal letter** or introduction. This section can appear in both informational and analytical reports.

The background provides a baseline of the current situation and any potential constrictions such as budget, time, human resources, etc. This section explains why the investigation or work was completed. It may introduce how the information is thorough, even if 100 percent certainty is not possible.

Purpose or Problem Statement

As mentioned, the **purpose** or **problem statement** section may be part of the background, or it can stand separately, depending upon the complexity of the report. The purpose or problem statement should be worded like this example:

> The purpose of this report is to address [the problem or question that the requester needs addressed]. This report will accomplish this by investigating [whatever you researched or developed for the report]k.

While the example shows the proper phrasing for an analytical report, it could be reworded to fit an informational report: for example, "details from three solutions are listed."

Research or Methods

The **research** section (also sometimes called **methods**) is where authors establish their credibility as they show how their perspective is supported by outside experts.This section provides background on where data used in the report was found: *it is not a section where data is listed.*

By telling your audience how you came to know what you have found out, you are demonstrating to them that your results are trustworthy and that they truly hold significance. With strong methods for finding out your facts, your readers will feel comfortable and confident in making the changes your report recommends. Your data will appear later in the **evaluation,** so that the data is in the same place as the reader is learning about its meaning. Additionally, the data can be presented in full in the **appendix**.

Completing and sharing research comes with a set of legal issues. Pay special attention Module 4: Research and follow the guidelines and rules you learn there. You'll always need to provide credit, or citation, for the information you gather from others. Lack of appropriate citation or attribution can cause legal and credibility problems.

Recommendation or Solution

This section may stand on its own, or it may have several subsections depending upon the complexity of the report. Additionally, depending upon the receptivity of the audience to your solution, this section may come earlier or later in the report. In some reports the **recommendation** is used in lieu of the **conclusion.** This section is found only in analytical reports.

In this section, you will report your recommendations, beginning with your first choice. Explain why you prioritized each choice by elaborating on different facets the solution's feasibility: economical, structural, and operational. Emphasize the solution's benefits. Remember you can suggest that you do not recommend a particular alternative solution. However, you need to explain why you do not recommend the solution, according to the economical, structural, and operational feasibility.

Overview of Alternative Options

In this section, you must underline the key features of each possible option. Make sure they are easy to understand and presented in a friendly layout. Keep in mind that the goal is to allow your audience to make the best decision. This section is typically used in informational reports, where no recommendation is made.

Evaluation

This should be the bulk of your report; you must evaluate the options using the criteria you created. Add graphs, charts, etc. to show that you have studied your options, and have come up with statistics that back up your reasons why your alternative beats the competition. If your audience is likely to be resistant to your recommendation, the evaluation should appear before you make the recommendation. This section is found only in analytical reports.

This section should state the end results of your research and detail how you got there: how you evaluated the alternatives and, from there, you would decided which alternative best fit your organization.

Benefits

This section explains the benefits of the solution. There is little reason why your proposal should be accepted if there are not meaningful benefits. Thus, be sure to show that your solution will result in substantial benefits for the organization, company, etc. Some may think to omit this section when the report was requested; however, it is always helpful to have comprehensive listing of why something is being proposed and to document all the items the solution addresses.

This section is found in analytical reports, especially in proposals. In informational reports, this section may provide a detailed "how-to" not associated with some type of comparison.

Qualifications

This section may stand alone or be part of the benefits section. A **qualifications** section is a good place to explain the talent and experience of yourself and your team members. Depending on your readers, this section may be small or large. As with all business documents, you need to be honest when you write your qualifications.

Management

This section may stand alone or be part of the benefits section. In some cases, the resumes of the proposed team for the project are requested or provided. In those situations, this section is found as part of the **back matter**. A project's success depends on its management team, and readers are impressed if you can describe your project management structure in your proposal. By identifying each person on your team and explaining what their tasks and responsibilities are, you can coordinate your work efficiently. It is very helpful for each person to know what they will be doing beforehand so there won't be many problems concerning leadership and time management further into the project.

Implementation

This section details when, why, and how the solution will be used for the first time. The **implementation** period is usually a trial period to see if the solution is feasible as planned. Thus, you will pick a time that does not impact the normal operation of existing programs, patterns of operation, etc. In addition, you will describe the location of implementation, who will be involved, costs of implementation, what is expected to happen, the date and time of implementation, the duration of implementation, etc. You should also explain why you chose this time for implementing the solution. State that during this time you will note what works and what needs to be changed.

This section is found in analytical reports, especially in proposals. In informational reports, this may provide a detailed “how-to” not associated with some type of comparison.

Schedule

A **schedule** section may be found separately if the product or project is complex. In other instances, it is combined with the **implementation** section. In some situations, the schedule is part of the back matter and exists more as a list or table of dates and accomplishments.

Schedules help provide readers with three things:

1. Schedules give readers a deadline, so they know when to expect a final result.
2. Schedules can be critiqued by readers to make sure they are feasible.
3. Schedules are a good way to keep track of how a project is proceeding.

In addition to project deadlines, schedules should also include due dates for drafts, resources, and other information that is needed to assist you with your project goal.

Methods of Operation

This section describes how the solution will fit into and be used as a functional part of the day-to-day operation of the company, business, etc. Detail the date you expect to launch the solution into the operation of the company, the place from where the solution will operate, how it will operate, and who will be involved (identify their responsibilities, duties, and any titles, certifications, degrees, etc.).

This section is found in analytical reports, especially in proposals. In informational reports, this may provide a detailed “how-to” not associated with some type of comparison.

Costs

This section tells how much the solution will **cost** in dollar amounts. This section is generally presented after all the explanation of implementation, benefits, etc. That way the reader is fully appreciative of what the costs cover. It is expected that numbers presented are accurate to the penny, unless otherwise specified by whatever margin of error is appropriate to the situation. In informal reports and some formal reports, this section is part of the body (or evaluation) detail. For some formal reports, there is extensive line by line detail of parts, services, and/or supplies. When this is the case, the costs section may be part of the appendices and will only be referenced from the body.

Numbers in costs are generally presented using tables, tabs, or spreadsheet inserts to align decimal points direct above one and other. Text aligns left and numbers align right as in the following table. If all numbers end with zero cents as in $24.00, omit the decimal and following zeros. Ensure any column of information has a heading. Most software offers attractive templates to set apart information and data. The best advice is to use the simplest formatting. These table should work to aid the reader in understanding and retention, rather distracting the reader with colors and shapes.

Description	Cost
Display Counters (2)	$75.50
Orange Signs (2)	$24.18

This section is found in analytical reports, especially in proposals. In informational reports, this will be used when the purpose of the reports was to research costs of some item.

Conclusion

The **conclusion**, as the header says, finishes the body of the report: it provides a summary of the major ideas of the report. While not as long as an **executive summary**, it may have a similar feel in order to provide a comprehensive reminder of the key components of either an analytical or informational report. The closing of a report should never introduce a fact or idea not presented earlier in the report.

In sales or persuasive reports, include in your conclusion how you're going to go implement your ideas for the company and how it will enrich the company; explain why the company should choose your course of action. Compare statistics and data and help the readers understand the logical choice and the course of action that would aid in selecting one option over the other. Refer back to your expertise on the subject matter and help them realize that your idea is the choice they are looking for. Based on your experiences, they will most likely take your side if you present the argument efficiently.

PRACTICE QUESTION

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Back Matter of a Report

It may sound like a catch-all to say that all that is left goes in the back matter (also called appendices). To do so appears to devalue the significant importance of material found in this section; however, the back matter can provide critical details that could not easily fit in the body of the report. This section can be used in both informational and analytical reports.

In the back matter, there is little prose provided to explain or connect the different items, as the purpose of each item was explained in the body of the report when each item was first referenced. Thus, the back matter is simply the location of these more detailed items that are critical to support the report.

There is no "standard" list of items that should be included in the back matter of a report. If the report is a response to an RFI or RFP, there may be extensive costs listed. In other cases, this section may include sample contracts, which can become finalized should the bid be accepted. There may also be extensive data sets provided, which cover far more detail than the body of the report allows. As mentioned in our discussion of the body of the report, you may also find individuals' resumes.

Simply put, this section can contain anything needed to further support your report; however, resist the temptation to overdo it and include only items that are truly relevant.

PRACTICE QUESTION

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Organization of Formal Reports

Formal reports may be informational or analytical. The logic and general structure is the same as with informal reports discussed earlier in this chapter. What changes is the depth of each part of the formal report.

Informational Reports

Informational formal reports typically follow the same broad structure introduced with the informal report: introduction or background, support or reasons, and summary. However, in formal reports each of these primary sections likely have their own subsections (as discussed in the previous pages).

Remember, despite the length of a formal report, its purpose is to present a synthesis of main ideas from the research, not simply to compile large quantities of data. If more detailed data is needed, it can be included in the back matter.

Analytical Reports

Analytical formal reports typically follow the same broad structure introduced with the informal report: introduction or background, support or reasons, recommendations, and conclusion or summary. However, in formal reports each of these primary sections likely have their own subsections (as discussed in the previous pages).

The order of the sections in analytical reports varies by likely reaction of the reader. Remember, if your audience is expected to react neutrally or positively to your message, then your conclusion or recommendation should be offered near the beginning of the report. If the audience is expected to react negatively to your message, then the conclusion or recommendation is offered towards the end of the report.

PRACTICE QUESTION

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How to Write a Formal Report

Writing formal reports, like informal report, and that of any other writing task follows the same three steps. First is the planning. Second is the writing. Third is the revising.

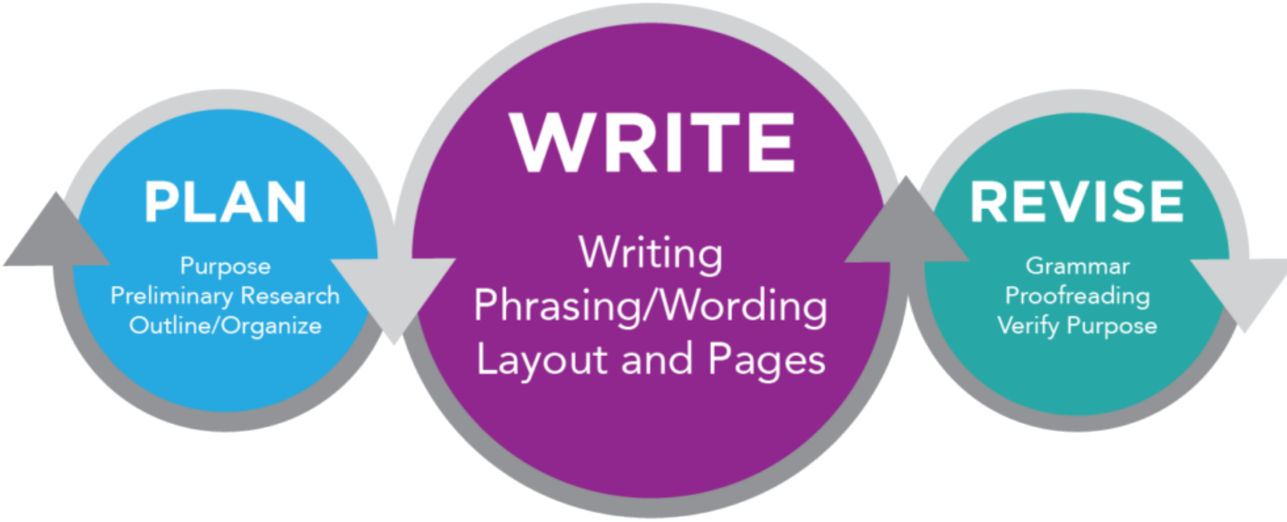

Figure 1.

Planning Your Formal Report

In all business writing, the first step is to check and see whether there is a prescribed structure for the document that is about to be created. If so, follow that. Many formal reports have specific formats that must be followed exactly. For example, some sales proposal requests and responses become part of a contract; therefore, you should ensure documents such as these have a legal review both in the planning of the document and as a part of the final review step.

Other steps in preparation of a formal report follow in the same way as those for an informal report. In an informal report, however, it is less likely there will be multiple writers. With a formal report, there may be many contributors. If so, it is important to meet as a group to divide the work, talk about style, and plan how the final document will be assembled and edited to ensure a common voice or tone throughout. You may wish to consider some of the strategies discussed in Module 12: Collaboration in and Across Teams.

Next you'll complete any data gathering needed. A formal report likely requires extensive planning and data gathering: some proposals may require weeks or months in researching and preparing. For example, think about a proposal for the next three years of new store locations or construction. The author (likely a team of authors) will need primary and secondary research, which takes a great deal of time to gather and analyze.

You will use knowledge of that data to create the report's outline. In constructing that outline, again consider the depth of understanding of the reader and the likelihood the reader's views align with that of the report's determination.

With group writing, there may be several coordination meetings at each stage of the document's creation.

Writing Your Formal Report

Writing the formal report is a much easier task once you have created a detailed outline in the planning process. This outline is what helps the writing move along, as you already know exactly what is to be provided where and when. When writing a formal report as a team, a carefully constructed outline facilitates assigning sections of the report to different authors from the team. The writer or writers can then focus on paragraph structure, wording, and phrasing using the lessons found in Module 2: Writing in Business.

With a formal report, it is extremely rare to see the casual phrasing that might be found in a short message or informal report. Formal reports rarely use personal pronouns, contractions, or passive verb structures. However, this does not mean the language should be stilted or use excessively long words. You'll continue to use the same clarity of wording as in all business communications.

Formatting Your Report

Formal reports implement many of the formatting skills you learned earlier. Usually formal reports are single spaced with double spaces between paragraphs. Usually paragraphs are not indented, but this may vary from organization to organization. The right hand side of paragraphs are left ragged.

Section headings are always provided in a formal report. It is acceptable to use labels to match the section's purpose (e.g., Introduction, Findings, Research Methods). The headings may also use terms directly related to the report's purpose such as "Fruit Spoilage Problem," "Facts about Fruit Spoilage," "Suggestions to Improve Fruit Freshness." You may also have specific subheadings within more general section titles.

Formal reports of all types use page numbers.The pages may be numbered in a format such as 1–50, or they may be numbered by the section, such as Methods 1–Methods 50. The material in the front part of a report is generally numbered in lowercase roman numerals (i–ix).

Revising Your Formal Report

because of the length and possible subject complexity of formal reports, the final review takes more time than you might expect and involves more people. As mentioned in the start of this section, some reports may require additional legal review.

The most effective way to ensure a professional document is to have a team of individuals independently read the document, marking changes, corrections, and questions as they go. This team then meets as a group with one individual charged with collecting all corrections. This person ensures continuity across the entire document. If such a formal process cannot be completed, then you should work to ensure there are at least two reviewers who review work they themselves did not write.

As mentioned before, the final revision must consider both grammar and style issues as well as revisiting the primary purpose of the document.

PRACTICE QUESTION

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PUTTING IT TOGETHER: REPORTS

You've finally put together your proposal for prepackaged dinner kits. You're excited that your idea is ready to be reviewed by Mr. Marks, the store owner. You were surprised how long it took to pull this together and keep up on your regular job—two months!

You're fairly confident in the work you produced: you made notes about exactly what you were trying to do, and that helped you find the information you needed. The process even included planning and collecting the results from a short survey.

Knowing your the owner well and knowing that the information could be easily summarized, you put together an informal proposal with just a few simple headings. With this decision made, you wrote up your proposal as a memo.

The not-so-fun part turned out better than expected. The outline that you created before writing seemed like a pain at the time, but it sure made the writing go much more quickly. The outline helped you remember to lay out how you found your information and how credible the information was. The prewriting process even gave you ideas as you wrote the content for each section.

Once the proposal was complete, you sent it off to Mr. Marks:

To: Mr Anthony Marks, Store Owner

From: Ms Sofia Ruiz, Produce Manager

Date: March 19, 2018

Subject: Proposal to Create New Product – Assembled Dinner Boxes

Please find the information you requested regarding possibly creating a new store product similar to what Blue Apron and HelloFresh offer. This report is organized by the description of your initial request, the way data was found to address the parts of the request, and what results were obtained. Knowing that the information is to be reviewed with consultants, no recommendation is made.

Problem Statement: Determine the cost model and potential customer demand for a store product where ingredients for a ready-made dinner is priced and sold.

Background: Meal-kit services are becoming increasingly popular, and are heavily marketed, potentially driving customers away from traditional grocery shopping. These kits provide ready-made ingredient sets with directions to make contemporary meals at home. These kits cost about $60 per week and serve three meals for two. Additionally, customers have if we had something similar to these services. This small grocery store has been looking for low cost ways to increase sales without being forced into new product lines that it does not know much about (like equipment rentals for things like carpet cleaners and grills).

Research: *Customer Demand.* To determine the likely customer demand and willingness to pay, an informal survey was created to ask various regular customers. Regular customers were selected since they would be the ones who would be in the most often and most likely to purchase on a regular basis. The survey had a target of 30 qualified potential buyers of the new product. It turns out that 35 surveys were collected.

Rather than approaching those customers who already mentioned a desire for this product, as other customers checked out over the past week they were casually asked the following:

- How often do you shop with us? (If the response was more than two times a month, the next question was asked)
- How many individuals do you usually cook dinner for? (If the response was two, then the next question was asked.)
- Would you be willing to try a new recipe for beef, chicken, fish, or vegetarian, if the ingredients were already collected for a small fee?
- How much is the most you would be willing to pay for a nice week-night dinner for two that can be prepared quickly? $3–8, $9–14, or $15 and up

Here are the results of the qualified 35 responses, based on those checking out the weeks of March 5 through March 16 during the afternoon shift.

	Yes	No	Unsure
Willing to try prepackaged	19	9	7
	$3 - $8	$9 - $14	$15 and up
Willing to pay	10	20	5

Research: *Costs.* A sample recipe that could be priced for was to determine how much each kit would cost. Knowing that Blue Apron is slightly less expensive than other products on the market, two sample recipes were acquired and priced against the same ingredients in our store.

Click to view the full report.

It seems the report and project is off to a good start. Mr. Marks received the memo and responded with a quick email: “Sofia, thank you for this information. It looks very thorough and well thought out. I’ll be eager to review this with my consultants. You have a good eye for this work.”

MODULE 7: PUBLIC SPEAKING

WHY IT MATTERS: PUBLIC SPEAKING

Why learn about public speaking in business?

One of the essential business and life skills often neglected in our "schooling" broadly is the art of public speaking. It's an odd omission given that the oral tradition is as old as civilization. Indeed, public speaking is a through-line in our history as a people and as a nation. This is not only an American phenomenon but a human reality. Whether signal or spark, speeches accompany the pivotal events of every time and place, rallying people around a vision of the future, be it the founding of a nation, a call to arms, or a call to action.

These ideas often transcend their times, tapping into an enduring sense of possibility or responsibility. Consider, for example, this excerpt from Dr. Martin Luther King's 1963 "I have a dream" speech: "I have a dream that my four little children will one day live in a nation where they will not be judged by the color of their skin but by the content of their character." (Note: King, Martin Luther, Jr. "I Have a Dream." 1963.) Over fifty years later, Dr. King's speech remains both resonant and relevant and, as an article from the the History Channel notes, it has "endured as one of the signature moments of the civil rights movement." (Note: History.com. "'I Have a Dream' Speech." History.com, 2017. Web. 26 June 2018.)

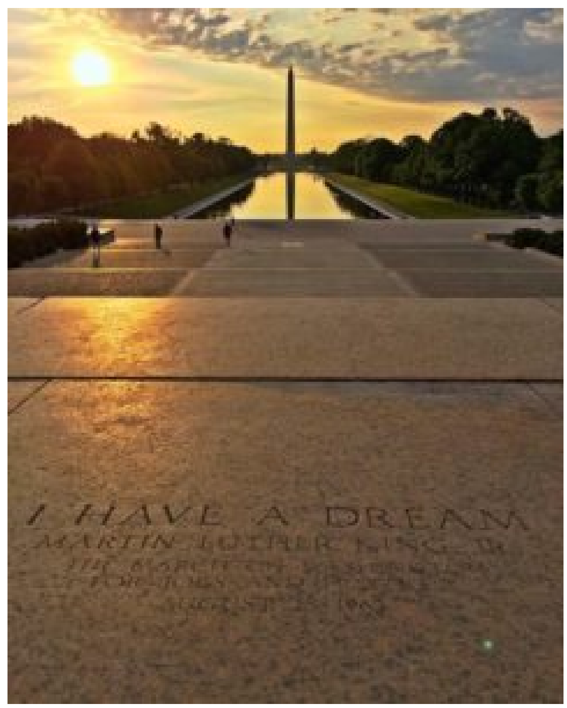

Figure 1. On August 28, 1963, Martin Luther King, Jr. gave his famous "I Have a Dream" speech from this spot on the Lincoln Memorial steps to an audience of a quarter million people.

Hillary Rodham Clinton's 1995 "Women's Rights Are Human Rights" speech given at the United Nations Fourth World Congress on Women is another example of a defining vision and values statement. To excerpt: "As long as discrimination and inequities remain so commonplace everywhere in the world, as long as girls and women are valued less, fed less, fed last, overworked, underpaid, not schooled, subjected to violence in and outside their homes—the potential of the human family to create a peaceful, prosperous world will not be realized." (Note: Garau, Annie. "History's Most Powerful Speeches Given By Women." All That Is Interesting, 28 Mar 2017. Web. 26 June 2018.) The title of a *New York Times* article by Amy Chozick about Clinton's positioning as a presidential candidate in 2016 sums up the impact of this speech decades after it was delivered: "Hillary Clinton's Beijing Speech on Women Resonates 20 Years Later."

Oral communication is not only a tool of preachers and politicians, it's a tool of the people. If you don't hear yourself or your world view represented, you can change that. Of course, you don't have to be working on a national or global scale to appreciate effective public speaking. To gain support for your ideas at any level, you need to be a clear and compelling oral communicator. Ultimately, public speaking matters because it can be the difference between being heard and shaping your world—however you define it—or living with the consequences of someone else's pronouncements. If you prefer the former option, let's prepare to be heard!

EFFECTIVE PUBLIC SPEAKING

What you'll learn to do: Identify key principles of effective public speaking

Like speaking itself, public speaking is a learned behavior. Just as no one comes out of the womb speaking eloquently, no one becomes a powerful orator without practice. In this section, we'll discuss the "why" of public speaking—the audience's expectations and the benefits that accrue to the speaker—and introduce a simple five-step process for developing an effective speech.

LEARNING OUTCOMES

- Discuss key characteristics of public speaking
- Discuss the importance of public speaking in a business setting
- Identify various audience needs and expectations that can be addressed by a speech
- Identify the five steps of developing an effective speech

What is Public Speaking?

Public speaking is, simply, an oral presentation or speech delivered to a live audience. It is generally a formal or staged event— although impromptu speeches are a common occurrence—and can be a defining career moment. For example, you may think you're attending a client meeting only to find yourself called on to explain a procedural or technical point being discussed. Or you may be sitting in a management meeting thinking you are just there to observe when you are asked to elaborate on an aspect of the supporting research and analysis or defend your recommendations.

IMPROMPTU SPEAKING

Although impromptu speaking isn't the focus of this module, it is worth noting that this type of speaking is something Toastmaster members train for on an ongoing basis using a technique called "Table Topics." For more on this technique, read A Table Topics Workout: The Power Packed Exercise for Stretching Your Brain.

Executive presentation coach Peter Khoury has reverse-engineered the characteristics of great speakers for over fifteen years. Combining his findings with scientific research on leadership, he's distilled this research into the following 9 characteristics of effective public speakers: (Note: https://www.linkedin.com/pulse/9-characteristics-highly-effective-public-speakers-peter-khoury/)

1. Confidence
2. Passion

3. Practice, don't memorize
4. Speak in a natural voice
5. Authenticity
6. Keep it Short and Sweet
7. Connect with your Audience
8. Paint a Picture through Storytelling
9. Repetition

Like computer failure and natural disasters, finding yourself in a situation requiring public speaking skills is not a matter of *whether* it will happen but *when* it will happen. Given the potential career impact, you need to prepare accordingly.

PRACTICE QUESTION

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Benefits of Public Speaking

What is public speaking but a dressed up—or not, depending on your audience—version of the basic skills we've been using since we first began forming desires and shaping the words and gestures to communicate those desires? Ah, life was simple then; a baby pointing and reaching towards a bowl of grapes or a toddler repeating "more milk" until they get what they want. Then again, one fundamental dynamic hasn't changed. As Stevie Wonder put it, "If you don't ask, you don't get." This is true not only personally but especially professionally. If you want the sale, contract, funding, job, project, or promotion, you have to be willing and able to ask for it in a clear and compelling manner. Often, in front of a group of deciders—those who will determine the response to your request. Welcome to public speaking!

What has changed is your potential—your potential to connect, to create or co-create and, given technology and social media/sharing, your potential reach and impact. In a statement echoed in virtually every career and leadership book and blog, the *Toastmasters International Guide to Successful Speaking* notes, "There is perhaps no greater skill [to] help you build your career or business than effective public speaking." As a testament to the tradition and enduring power of oral speech, the primary motivations for speaking are the same as they were in ancient Greece. Aristotle, who wrote a treatise on the art of persuasion titled *Rhetoric*, identified three primary motivations: to inform, to persuade, and to inspire. Practically speaking, public speeches often include more than one element. For example, communicating a risk or potential opportunity may be done in conjunction with building support for a change in business practices or a proposed initiative.

Public speaking is also an exceptional, and cost-effective, way to build your brand and network within your organization, profession, or industry and/or to build good will for your company in the community. Whether you're pitching a product, service, idea, company or person (including yourself), public speaking differentiates you and your message from the promotional noise and general chatter. As professional speakers and authors Jeff Slutsky & Michael Aun note, public speaking "literally puts you on a pedestal." Indeed, the average audience member assumes that since you're speaking on the topic, you must be an expert. Of course, the impression they leave with depends on the quality of your speech, but the bottom line is that being a speaker gives you a level of credibility that would take a significant amount of time to cultivate otherwise. Speaking allows you to develop a reputation as a thought leader or community leader, raising your visibility and perceived market value. That's not something a cover letter and resume or pitch is likely to do—if it even makes it through the filters.

PRACTICE QUESTION

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Audience Expectations

One of the finest, and rarest, gifts a person can give is their attention. When it comes to audience attention, that gift comes with an expectation. Audience expectations are simply an extension of the three speaker motivations. Specifically, audience members expect to learn from an informational speech, to be moved by a persuasive speech, or to be inspired by an inspirational speech.

Perhaps your first and most important test as a prospective speaker is to make sure you clearly communicate the purpose and benefits of attending your speech. A disconnect between what audience members thought they signed on for and what they're hearing can trigger a range of undesirable audience behaviors from zoning out to walking out. As a speaker, you also have an obligation to factor your audience into the design and development of your speech, from relevant examples to appropriate language and subject matter depth. Whatever your stated intent (benefit), the minimum audience expectation is that you fulfill it in a clear and coherent manner.

One additional point to consider is the medium. Public speeches are live events. Why would you purchase a ticket and go to see a concert or comedian or other event live rather than buying a DVD or tuning in to podcast or TV broadcast for a fraction of the price? There's a difference in the level of energy and engagement in a live "performance"—whether it's a speech, dance recital, political rally, or musical event. Keep in mind that those attending a public speech expect an experience that transcends a one-dimensional transfer of information.

PRACTICE QUESTION

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Developing an Effective Speech

Let's assume you see the value in developing public speaking as a skill. Where do you start? A good warm-up exercise is to watch a few TED Talks, organized by topic and popularity, among other categories. If you prefer to proceed straight to the cream of the crop, Steve Jobs' classic "How to Live Before You Die" speech delivered at Stanford University's 2005 commencement is excellent inspiration and perspective—for life as well as for speaking. If you watch a few talks, you'll notice that each presenter has a unique message and style that makes him or her compelling. This is a key point. While we all learn process and technique by copying the masters, as legions of artists have done before us, the artistry (and magic, from the audience's standpoint) is in finding your own voice and developing your personal style. In practical terms, this means that you also have to develop and curate your own material using your life experience, insights, and observations to illustrate your points.

Whether you're facing a blank sheet of paper or a blank screen, the start is always the hardest part of a speaking project. We're going to work through that obstacle by following this five-step jump start.

1. Choose your topic
2. Develop your benefit statement
3. Develop your positioning statement
4. Derive your title
5. Create your content

U.S. Supreme Court Justice Sonia Sotomayor giving a speech.

Choose Your Topic

For perspective on topics, you can scan the 194 topics (click on "Browse the complete topic list") used by the National Speakers Association. If there's a conference or Chamber of Commerce or professional association event you want to speak at, scan the associated website(s), social media posts, and publications to get a sense of what topics might be a good fit. In choosing your topic, consider your experience and expertise. That's not to say that you need to be an acknowledged expert on a particular topic—that's where research comes in—but you do need to have an interest in the topic and a base level of credibility. Although there are hundreds of potential topics, it's very likely that a particular topic has already been covered a number of times by a number of people. Given that, the essential question is what can you bring to the topic that others haven't? That is, how can you approach an exhausted topic with fresh eyes to make it feel new and engaging?

Develop Your Benefit Statement

Once you've decided on a topic, the next step is to develop a one to two sentence benefit statement that supports your credibility as a speaker on that topic. The benefit statement should answer the question: *why you?* This is similar to the process you would go through in pitching an article to a publisher. What is the unique value—experience, expertise, point of view—that you bring to the topic? For different frames of reference on benefit statements, scan the speaker bios and bylines of writers that cover topics of interest to you.

Develop Your Positioning Statement

The positioning statement is an expansion of the last step that tailors your benefit statement to a specific audience. Working through this step helps you clarify who your audience is and what you will be presenting to them. Although the positioning statement is for internal purposes, the focus is external—what's the ROA (return on attention) for the audience? Don't skip this step; it will help you focus your thoughts, minimize interesting but off-point digressions, and help maintain a coherent structure and flow through the research, writing, editing, and ultimately, speaking phases.

Develop Your Title

In moving from your positioning statement to the speech title, think of your speech as a product or service—what would prompt someone to "buy" what you're offering? Your title is a pitch—or your bid for the audience's attention. To get to that pitch, select a few key words from your positioning statement and brainstorm a compelling headline. For additional insight and exercises, read Larry Kim's *Inc* article, "30 Ideas for Super Clickable Blog Headlines," explore the BBC News resources on writing headlines, or watch the "How to Write a Hook" YouTube video. You may also want to browse the titles of articles and blogs posted to your target audience's (i.e., industry or professional association) websites and publications. Remember that as you develop your content, your title might need some adjusting. If you don't need to submit your title far in advance (to be printed in a brochure or program), revisit it once your content is complete to make sure it still fits. If you do need to submit it before your content is fully developed, try to leave a little wiggle room and not make it too specific regarding the conclusions you might come to.

Develop Your Content

Once you have your title and framework from your positioning statement, you're ready to start developing your content. Of course, you've been building useful content all along through your life experiences. Reflect on the relevant lessons you've learned, and make note of some of the experiences—a key quote or visual, an emotion or insight, people or places. Use these events as possible connections to consider and, if applicable, work them in to your speech to illustrate your points. Research is a skill, and art, unto itself (refer to the Washington University librarians' Conducting Research pages for additional tips and resources), but a good jumping-off point is doing an internet search of your keywords. If you have lead time, you can set up a Google Alert to monitor relevant news and developments. It can also be helpful to find and follow subject-matter experts for your topic and tune in to current trends. To do this, conduct "*best of*" searches to find thought leaders. You may achieve both objectives in one search, as in this *Forbes* article: "Top Shopping Trends of 2018: Retail Experts Share What to Watch for Next Year," one of the results in a search for "*best retail marketers*."

Reminder: Remember to document your sources! Include citations in your written speech in order to give credit where credit is due and to be able to follow-up on any related audience questions.

PRACTICE QUESTION

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There you have it! A simple process for sidestepping writer's or speaker's block. Next, we'll discuss another common sticking point: how to open your speech.

DELIVERY TECHNIQUES

What you'll learn to do: Describe delivery techniques for use during a public speech

As alluded to in the prior section, a live speech is, in effect, a performance. In addition to what you say, audience members will be reacting—both consciously and unconsciously—to how you say it. In this section, we'll discuss fundamental considerations, including how to open your speech, how to use gestures and body language to punctuate your message, and what types of language to avoid.

LEARNING OUTCOMES

- Discuss effective ways to begin your speech
- Discuss strategies to effectively use body language and gestures to emphasize your message
- Discuss strategies to effectively use vocal variety to emphasize your message
- Identify types of language to avoid in your speech

Starting Your Speech

Your opening comments, like the lead sentences of an article, can make or break a speech. As William Zinsser phrases it in *On Writing Well*, "The most important sentence in any article is the first one. If it doesn't induce the reader to proceed to the second sentence, your article is dead." (Note: http://training.npr.org/digital/leads-are-hard-heres-how-to-write-a-good-one/) In a chapter on speaking, *Management Communication* author James O'Rourke tells the story of a plant controller who was asked to make a five-minute presentation about his value to the company. In an attempt to tap into the imagination of the audience of eighteen senior executives, the controller opened with a race car metaphor. After four sentences, he was cut off and asked to leave the room. In another instance, a speaker's opening joke, drawn from a book of speaking tips, fell flat. After the fact, the speaker reflected that a joke wasn't the best fit for a rather serious audience and noted that "when you lose something in the first two minutes of a talk, you just can't get it back."

With this type of pressure, what's a speaker to do? Often, the best option is to forget the introduction until you know what it's introducing—until you have completed a full draft of your whole speech. That is, don't force an introduction and don't become too invested in your first idea. Write a draft or "working" opening and allow additional options to emerge as you work through the research (including audience research) and content development process. The dual objectives are to capture your audience's attention and to set the stage for your speech. That is, your opening should reflect your stated intent and be an accurate indication of what will follow—the main substance of your speech.

In an article for *YPO*, an association for chief executives under the age of 45, communication strategist Matt Eventoll summarizes effective ways to open a speech and throws in one classic—and oddly common—fail. First, the effective options:

1. **Quote.** Use a relevant quote to set the tone for the speech.
2. **"What if?"** or, similarly, **"Imagine."** Asking a "what if" or "imagine" question immediately engages your audience and invites them to be a part of the creative process.
3. **Question.** Posing a question engages the brain and prompts an instinctive answer, whether internal or verbalized.
4. **Silence.** A strategic silence of two to ten seconds creates an additional level of attention and expectation. The caveat: *you had better be able to deliver!*
5. **Statistic.** A powerful, relevant statistic can convey a key idea with impact and evoke emotion.
6. **Statement.** An emphatic phrase or statement can be used to create a sense of drama and anticipation.

The epic fail, generally followed by a collective disconnect on the part of the audience, is opening with some variation of "thank you for inviting me" or "today I'm going to be talking about." If your audience isn't invested from the beginning, it's likely the point of your speech will never really be heard.

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Body Language and Gestures

One of the essential rules, and success factors, for public speaking is authenticity. This is as true for your non-verbal language as it is of the words you say and the ideas you express. Body language and gestures are a form of expression and can be either meaningful or distracting.

Toastmasters International, the global non-profit dedicated to teaching public speaking skills, believes that “gestures are probably the most evocative form of nonverbal communication a speaker can employ.” (Note: Toastmasters International. *Gestures: Your Body Speaks*, p. 8. 2011. Web. 26 Jun 2018.) In their *Gestures: Your Body Speaks* publication, they identify the following seven benefits of incorporating gestures into your speech: (Note: Ibid.)

1. Clarify and support your words
2. Dramatize your ideas
3. Lend emphasis and vitality to the spoken word
4. Help dissipate nervous tension
5. Function as visual aids
6. Stimulate audience participation
7. Are highly visible

> Note:The *improper* use of gestures can have *just as powerful* an effect but will likely be *detrimental.* To avoid this, record yourself presenting and make sure your gestures are consistent with your words. When the two are telling different stories, you create confusion and lose credibility and rapport with the audience.

Body language—how you dress as well as your mannerisms—is another powerful communication element. For perspective on this point, and a powerful speaking and life hack, watch social psychologist Amy Cuddy’s “Your Body Language May Shape Who You Are” TED Talk. The core idea is that we make judgments based on body language, and those judgments can predict meaningful life outcomes. In one example cited, social scientist Alex Todorov found that one-second judgments of political candidates’ faces predict 70 percent of U.S. Senate and gubernatorial race outcomes. What is perhaps more important, however, is that our body language reflects how we judge, think, and feel about ourselves. The key takeaway from this is that our bodies change our minds. That is, we can change not only how we are perceived but how we perceive ourselves by managing our body language. As a speaker, you must be conscious of, and cultivate, the presence you bring to your speech.

To quote Toastmasters International, “When you present a speech, you send two kinds of messages to your audience. While your voice is transmitting a verbal message, a vast amount of information is being visually conveyed by your appearance, your manner, and your physical behavior.” (Note: Ibid.)

Your use of gestures and body movement should reflect not only your personal communication style but should also match the audience and the environment. A good practice is to “preview” the attendees or venue by sitting in on a prior event, watching a video, or scanning the event’s social feeds. This will give you a sense for audience dynamics and the size of the room. Certainly ask the event organizers in advance about the setup of the room in which you will speak. Consider adjusting your gestures to fit the audience, room size, and acoustics. For example, you may may want to tone down your gestures in a smaller space and put more emphasis on vocal rather than physical delivery. This doesn’t mean that you should put your personality on “mute” if you’re a naturally ebullient or expressive person. The key is to manage your mannerisms so they don’t overpower either your audience or your words. If the room is a large auditorium filled with enthusiastic fans, you may want to increase your physical presence with gestures to better “fill” the space. Rehearse new elements so they become fluid and reinforce rather than detract from your message. Remember that gestures and body language are most effective when they’re used as “visual punctuation.”

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Vocal Variety

Just as gestures and body language affect how you are perceived, vocal variety effects how you are heard. As presentation skills training consultant Gavin Meikle notes, “A carefully crafted speech can be ruined by a dull vocal delivery.” (Note: Meikle, Gavin. "Six Elements of Vocal Variety and How to Master Them." *Inter-Activ*. 18 Jun 2017. Web. 25 Jun 2018.) In a series of posts on vocal variety, Meikle identifies six key elements, common errors, and good practices to develop greater vocal impact. (Note: Ibid.)

- Volume. Develop your range and vary your volume. To help put this in perspective, consider the saying, “A good speech needs light and shade.”
- Pitch and Resonance. Research suggests a general preference for lower vocal pitch, with participants ascribing more positive personality traits to lower pitched voices. For example, Margaret Thatcher was considered to have a voice of leadership.
- Pace and Pause. Be aware of and manage your speaking speed and practice your pauses. It’s been found that people who slow down their pace when speaking to groups are thought to have greater gravitas, credibility, and authority.
- Intonation.This describes changes in vocal tone within a sentence. In order to achieve the desired effect, use the three common intonation patterns appropriately.
    - Ending a spoken sentence with a rising tone indicates a question or suggestion.
    - Ending a spoken sentence with a descending tone is generally interpreted as an order.
    - A flat intonation is used to indicate a statement.

As legendary advertising creative director William Bernbach noted, “It’s not just what you say that stirs people. It’s the way that you say it.”

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Language Choices

Whether we speak to inform, persuade, or inspire, the common denominator is a desire to communicate and to arrive at a shared understanding of an idea or situation. To quote author and TED Conference curator Chris Anderson, “Your number one task as a speaker is to transfer into your listeners’ minds an extraordinary gift—a strange and beautiful object that we call an idea.” (Note: Anderson, Chris. "TED's secret to great public speaking." *TED*. Mar 2016. Web. 25 Jun 2018) And yet, the very expertise that makes us the right person to deliver a speech on a particular topic can make us incapable of achieving that objective. An in-depth understanding can lead us to oversimplify or over complicate the explanation of a concept foreign to our audience.

One of the most common barriers to communication is jargon, or the terminology associated with a particular profession. As the French philosopher Étienne Bonnot de Condillac observed, “Every science requires a special language because every science has its own ideas.” For perspective on this challenge, and how to overcome it, watch Communications teacher Melissa Marshall's "Talk Nerdy to Me" TED Talk. Directed at scientists, but with broad applicability to communicators, Marshall describes her "Alice in Wonderland" experience teaching communication skills to engineering students. Extrapolating on her point, if we don't know about or don't understand the work of those who are trying to solve the grand challenges of our times, then we can't support it. Marshall notes that jargon in particular, is a barrier to communication. For example, "you can say 'spatial and temporal,' but why not just say "space and time," which is so much more accessible to us?" (Note: Marshall, Melissa. "Talk Nerdy to Me." *TED*. Jun 2012. Web. 25 Jun 2018) A few specific recommendations:

- Eliminate bullet points (use a powerful visual instead).
    - Because you're giving a speech, rather than a business presentation as discussed in Module 6: Reports and Module 8: Developing and Delivering Business Presentations, you shouldn't need bullet points to keep you or your audience on track.
- Use stories and analogies to scaffold your important points
- Display images and diagrams to illustrate what's being described.

A related point, covered in detail in Module 13: Social Diversity in the Workplace, is to be sensitive to socio-cultural variations in language and interpretation. As the French proverb notes, "The spoken word belongs half to him who speaks and half to him who listens."

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The following video is a great talk about the mistakes and cornerstones of speech, which help you encourage your audience to listen and care about your points:

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AUDIENCE ENGAGEMENT

What you'll learn to do: Identify the role and importance of your audience

In order to achieve the key objective identified by TED Conference curator Chris Anderson—the transfer of an idea—a speaker must effectively engage audience members. In this section, we'll discuss techniques you can use to capture and maintain audience members' attention and ways to incorporate interaction without losing control.

LEARNING OUTCOMES

- Describe techniques to gain and keep an audience's attention
- Discuss effective ways to use audience participation
- Discuss appropriate ways to respond to questions without derailing a presentation

Audience Attention and Rapport

The key to capturing and maintaining an audience's attention is, to riff on the TED Talk tagline, having an idea worth sharing and sharing it with emotion. As expressed in one of author and cartoonist Hugh MacLeod's business card art creations: "a story without love is not worth sharing."

The following techniques are adaptations from author and communication expert Mike Parkinson's "Spark a Fire: 5 Tips to Grab and Hold Audience Attention" article on presentationexpert.com:

1. Surprise: Saying, showing, or doing something unexpected reengages the audience's brains.
2. Suspense: Use drama, slowly building your idea like a verbal puzzle.
3. Storytelling: Share a unique and compelling story to illustrate your point.
4. Senses: Engage the senses—hearing, sight, taste, touch, and smell. The greater the sensory engagement, the stronger the interest.
5. Involve: Invite participation, a point we will address in the next section.

In addition to these five techniques, consider the the six techniques mentioned on the Starting Your Speech page. These techniques, including using quotes, "what if" questions, silence, and statistics can be used to check in with and engage your audience throughout a speech. Give your audience something they can use—give them a reason to care!

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Audience Participation

Audience participation is not only an effective way to reinforce learning, it's associated with higher levels of attendee engagement, which may translate into higher satisfaction and understanding. Consider the following audience participation options, drawn from The Toastmasters International Guide to Successful Speaking and other sources:

1. Volunteer Exercise: Invite a member of the audience to participate in an exercise or role-play.
2. Audience Survey: Surveying the audience—for example, "by show of hands"—allows you to assess the needs and temperament of the audience and fine-tune your speech accordingly.
3. Question: Asking a leading question of the audience like, "What is your biggest hurdle when preparing for employee performance reviews?" allows a speaker to surface ideas or problems and challenges to be addressed during the speech.
4. Q&A: A variation on the question technique, time for a Q&A period at the end of the speech allows attendees to clarify open points. Make sure you anticipate likely questions and are prepared with answers. Thorough audience analysis (as discussed in previous modules) will help you anticipate both the content and the level of sophistication of the questions you might get. To overcome initial audience reluctance, you can plant questions, prompt with frequently asked questions, or draw from questions submitted in a pre-session survey.

5. Partner Exercise: Pair audience members to practice a technique learned or test learning with a think-pair-share or other collaborative learning exercise.
6. Small Group Exercise: Best used for brainstorming solutions or to generate relevant questions for deeper learning or more specific application.
7. Written exercises or note-taking: Asking attendees to take notes or complete written exercises—answering a self-assessment, identifying goals, taking a quiz, or filling out a worksheet.

You may notice that these techniques are all pretty straightforward. You should avoid using audience participation plans that are too off-the-wall—like asking your audience to sing, to mime their morning routine, or to hug the person next to them (all real examples). Such techniques are as likely to alienate your audience and lessen your credibility as they are to enhance your speech.

PRACTICE QUESTIONS

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Responding to Questions

A key consideration when incorporating audience participation is maintaining control. To avoid having an exercise deteriorate into chaos or a question turn into an an extended digression, set clear expectations and enforce the ground rules. If you ask participants to do a partner or small group exercise, clearly communicate the process and timeframe. Let participants know how long an exercise will last and tell them when to begin and when to stop. Allow enough time for participants to get value from the exercise but not so much time that some groups become bored or distracted.

The University of Leicester's oral presentation student resources provide preparation perspective and the following 4 step approach to managing Q&A: (Note: https://www2.le.ac.uk/offices/ld/resources/presentations/questions)

1. Listen: Don't jump to conclusions and start framing a response before the attendee finishes stating the question. Knowing that the questioner is likely thinking on his or her feet, consider both the content and intent of the question.
2. Understand: Paraphrase the question to confirm understanding.
3. Communicate & Involve: To involve the entire audience and minimize the risk of an extended dialogue with the questioner, restate the question so all can hear and feel a part of the conversation.
4. Respond: Direct your answer to both the questioner and other audience members. Keep your response focused and confirm that you answered the question.

Their planning notes are worth considering as Q&A guidelines. For example, you may decide to limit the topics open for discussion or defer questions that are outside the scope of your talk. You might open a Q&A with a limiting phrase such as, "Are there any questions on the four techniques I've presented?" Or you could "table" a question with a response indicating that the question falls outside of the stated purpose for your speech and an softening statement such as, "I'd love discuss that with you at another time, feel free to email me." As with audience participation during the speech, it may be worth establishing and communicating a time limit for individual questions and the overall Q&A session.

Note: Q&A sessions can easily be derailed if the speaker (or moderator, depending on the set up of the event) doesn't moderate question askers well. If a speaker turns back to the questioner and says, "Did that answer your question?" it can lead to unwanted dialogue if the questioner says no or decides to elaborate. Make sure you are prepared to politely move on from the initial questioner so you don't end up in a dialogue situation.

PRACTICE QUESTION

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SPEECH TIPS AND TECHNIQUES

What you'll learn to do: Discuss tips and tricks to giving an effective speech

We're living in a time where ideas—learning and sharing—are essential skills. According to communication coach and bestselling author Carmine Gallo, "Ideas are the true currency of the 21st century." The caveat: if you can't communicate your ideas in a way that captures attention and inspires action, it doesn't matter how good your ideas are.

LEARNING OUTCOMES

- Discuss various strategies for overcoming common fears and anxiety about public speaking
- Discuss public speaking strategies of effective public speakers

Overcoming Fears and Anxiety

In addressing fear of public speaking, author and professional speaker Michael Aun shares a quote from his grandfather who defined fear as "an absence of knowledge and a lack of information." If you think about it, the fear of public speaking is simply a recognition of a learning gap, be it a lack of confidence in our knowledge of the material or an inability to effectively communicate our expertise. We don't look at a bicycle and fear learning how to ride it (maybe getting hurt, but not the process of learning a new skill), so why should we fear developing skills that can improve our careers, our lives and, perhaps, our world? Logic aside, the fear of public speaking is so common that Mayo Clinic addresses it as a "specific phobia" on its website. In an article titled "Fear of Public Speaking: How Can I Overcome It?," Dr. Craig N. Sawchuk provides ten tips for managing performance anxiety or stage fright, which are adapted below:

- **Know your topic.** In a point echoed by many professional speakers and coaches, Sawchuk notes that having a strong interest in and understanding of your material, including preparing responses to possible questions, will help you stay on point and keep your composure.
- **Get organized.** The more organized you are—regarding information, materials and logistics—the less nervous you'll be.
- **Practice, rinse and repeat.** If possible, practice your speech and request feedback from friends, family, and colleagues. You can also record and critique your own performance.
- **Challenge worries.** Reality check your negative projections. List and then directly challenge specific worries, considering the evidence and alternative outcomes.
- **Visualize your success.** Imagining a successful speech creates a more positive frame of mind that can reduce anxiety.
- **Do some deep breathing.** To calm yourself, take a few deep, slow breaths before you get up to speak and remember to breathe during your speech.
- **Focus on your material.** People tend to focus on new information, so focus on your message rather than the messenger (you and your nerves) or the audience.
- **Don't fear a moment of silence.** If you draw a blank or get off-topic, take a few seconds and a few deep breaths to regroup.
- **Recognize your success.** Congratulate yourself for on a completed speech. Reflect on your performance and identify what worked well and areas for improvement.
- **Get support.** Join a public speaking group that can help you develop your skills in a supportive setting.

PRACTICE QUESTION

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In an article for Forbes, author Carmine Gallo cites the results of a Prezi survey of American professionals indicating that 70 percent of those who give presentations agree that presentation skills are critical to their career success. Gallo's rejoinder: "The other 30 percent don't know it yet!" Further, 20 percent of respondents indicated they would do almost anything to avoid giving a presentation, even if it means losing respect. Given that, developing effective speaking skills is a powerful differentiator. The good news is that you're not in it alone. You can join a local Toastmasters group (your college or work may sponsor a group), a campus speech and debate team, a speakers bureau, or take a Dale Carnegie course. If you're an introvert, you can start by analyzing TED Talks and reading related articles and books on public speaking skills.

Pro Tips

In this section, we'll focus in on a few key tips and resources drawn from bestselling author and communication coach Carmine Gallo's *Talk Like TED: The 9 Public Speaking Secrets of the World's Top Minds*. For context, TED Talks started as a one-time TED (technology, entertainment, and design) event in 1985, and have since morphed into a global brand and experience. At last count, TEDx (independently organized, local-level conferences) were being produced in over 130 countries at a rate of five events per day. As Gallo notes, "the world is clearly hungry for great ideas presented in an engaging way." Consider the following four points a jump-start to further reflection and skills development from a professional public speaker.

Understand the Power of Pathos

Although emotion doesn't factor into the definition of persuasion, it is an essential ingredient. Ancient Greek philosopher Aristotle identified the three elements of persuasion as ethos (credibility), logos (logic) and pathos (emotion). When Gallo analyzed human rights lawyer Bryan Stevenson's "We Need to Talk About Injustice" talk, voted one of the most "persuasive" on TED.com, the results were surprising to many: 65% pathos, 25% logos and 10% ethos. Emotion often drives decision making and opinion formation.

Believe in Your Message

To quote law enforcement veteran Morgan Wright, "If you don't believe what you're saying, your movements will be awkward and not natural. No amount of training—unless you're a trained espionage agent or psychopath—will allow you to break that incongruence between your works and actions." You must trust in what you are sharing with your audience or it will come across as insincere.

Keep Your Speech Brief

Keep your speech succinct, about 20 minutes or less. The science behind this ideal speech length explains how too much information creates a "cognitive backlog" and state of anxiety in your audience which prevents the transfer of ideas. A shorter speech imposes a discipline that forces you to clarify your ideas and helps you communicate for effectively. Brevity is also key to this era of sharing online; if your speech is recorded and available on the internet, a shorter speech is easier to publish and access.

Make it Memorable

Invest time in distilling your big idea into a short statement that's captivating and shareable. For perspective, scan @TED Talk Quotes on Twitter or search quotes on the TED.com site. A short, memorable summary statement makes is easy for your audience to remember both you and the point of your speech when you include unforgettable phrases like:

If everything seems under control, you're not going fast enough. – Mario Andretti

The difference between successful people and really successful people is that really successful people say no to almost everything. – Warren Buffett

Design is not just what it looks like and feels like. Design is how it works. – Steve Jobs

PRACTICE QUESTION

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ADDITIONAL RESOURCES

- If you're new to TED Talks, the TED in 3 Minutes playlist serves a selection of "snackable" talks.
- Toastmasters International: Find a Club
- National Speech & Debate Association
- Dale Carnegie Training: Presentation Effectiveness Course Finder

PUTTING IT TOGETHER: PUBLIC SPEAKING

Becoming a public speaker is a rite of passage, an event that marks one's emergence as a business or civic leader. Unlike a title that generally requires an external award decision, the accompanying change in status is a role you assume. Of course, being an effective oral communicator entails having something to say—that is, a compelling point of view, a truism captured in this simile: "A good speech is like a pencil; it has to have a point."

As with any leadership role, oral communication also involves responsibilities. While we all have the right to free expression, we also have the responsibility to exercise that right thoughtfully. This means applying critical thinking and conducting credible research in order to develop both our position and supporting arguments. As an orator, you also have the responsibility to use your communication skills ethically.

Public speaking isn't all upside and addressing feel-good topics. Taking a stand involves risk and requires courage. Of course, there's risk in any decision, and sometimes inaction is riskier because it allows others or current circumstances to decide for you. We also have the opportunity to use our platform to inspire change and to be the change. As Eivor Taylor put it: "There is no 'they.' We are the only ones who can make [the] change."

For perspective, consider the #NeverAgain gun control movement started by some survivors of the mass shooting at Marjory Stoneman Douglas High School in Parkland, Florida. As Atlantic contributing editor Michelle Cottle noted in her "How Parkland Students Changed the Gun Debate" article, these teens have the training to express themselves and the confidence that they will be heard. At a rally, Stoneman Douglas senior Emma Gonzalez stated, "Every single person up here today, all these people should be home grieving. But instead we are up here standing together, because if all our government and president can do is send thoughts and prayers, then it's time for victims to be the change that we need to see." For perspective on the people behind the movement, read the *New Yorker* article "How the Survivors of Parkland Began the Never Again movement."

Figure 1. Parkland students at a political rally.

Becoming an effective public speaker can be transformational—for you personally, for your audience, for the cause or brand you represent, and for society. Reflect on the stories that have shaped your personal and career development as well as your understanding of the world and your place in it. What if you had a superpower that gave you that type of influence, the power to shape business practices, public policy, or “the way things work” in any number of areas of human endeavor? Public speaking can be that superpower.

MODULE 8: DEVELOPING AND DELIVERING BUSINESS PRESENTATIONS

WHY IT MATTERS: DEVELOPING AND DELIVERING BUSINESS PRESENTATIONS

It's mid-May; a major retail management conference is less than one month away. Your manager has been recruited as a speaker in the Redesigning Retail track at the annual Sustainable Brands conference. She's asked you to assemble background information and tune in to relevant media and social media feeds. You're scheduled to meet with her next week to discuss your findings and an approach to her topic: "To-the-Bank Trends: How Green is Driving Retail Dollars."

On Monday morning, your hear your manager shattered her leg in a rock-climbing accident over the weekend, and she will be out of commission for three months. When she calls you later that week, you're taut with anticipation—this is your opportunity to step up and demonstrate you have what it takes to be a manager. You're ready! In fact, you've been ready. But what you didn't realize is that the person who steps up will also be the person stepping out on stage at SB '18 and presenting in front of thousands of high-level attendees. This is what's known as a career moment.

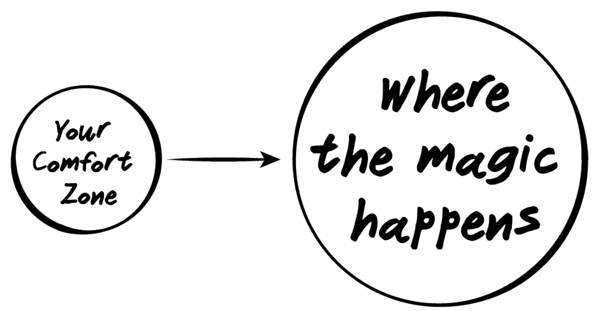


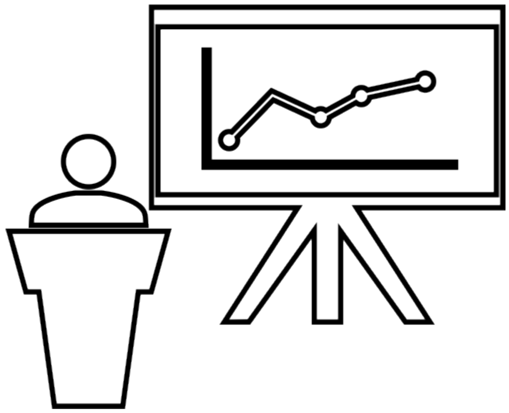
Figure 1. Career moments happen outside of our comfort zone

In life, as in mythology, we're never really ready for the call. Regardless, ready or not, our response is what defines both our character and our career trajectory.

So let's prepare for the call.

VISUAL AIDS

What you'll learn to do: Discuss the usefulness of visual aids and identify common presentation tools



How does one prepare for the proverbial call or career moment? In this module, we'll focus specifically on business presentations. In this section, we'll explore presentation tools and factors to keep in mind when evaluating materials, from your choice of words and images to your presentation style.

LEARNING OUTCOMES

- Discuss key concepts to keep in mind as you create business presentations
- Discuss available presentation tools to help engage your audience

Key Considerations

Presentation software allows you to take an oral presentation to the next level—engaging your audience verbally and visually as well as aurally. What's particularly powerful about using presentation software and other visual aids is the ability to use imagery to bridge cultural and language gaps and arrive at a shared understanding of the issue/opportunity at hand.

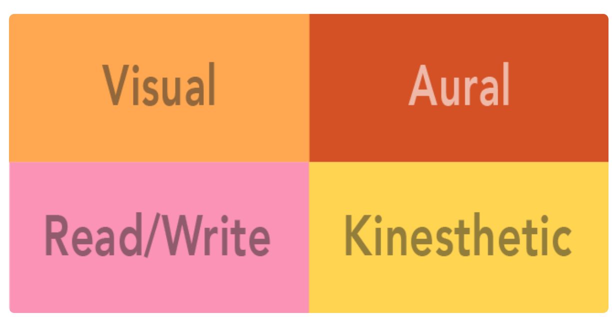


Figure 1. There are four commonly accepted modalities for learning, often abbreviated as VARK.

A related point to keep in mind is that words have two different meanings—a literal or denotative meaning (think: Merriam-Webster or Wikipedia definition) and a more subjective or connotative meaning. The connotative meaning of a word is based on a person's cultural background and experiences and has emotional and/or judgement associations. Accomplished presenters are attuned to their audience and avoid words or references that may be misinterpreted by non-native speakers or may be perceived as emotionally "loaded" by audience members from a different subculture. In an increasingly diverse society, cultural awareness is as important for business communicators as it is for international marketers. To ensure that the message you intend to convey is what will be received, ask peers or colleagues—ideally, those with a socio-cultural profile similar to that of your audience—for feedback, with particular attention to the subtext of words and images.

Using multimedia—images, photos and video and animation—that supports your point also provides repetition and can increase retention. A memory research pioneer, German psychologist Hermann Ebbinghaus, found that we forget approximately 50 percent of new information within 18 minutes, with retention falling to 35 percent after a week. However, Ebbinghaus also discovered that repetition of the new information at key intervals can change this trajectory, a discovery known as the spacing effect. Specifically, repeating the information at a 10–20 minute, 24 hours and 7 day intervals countered the initial memory loss and reduced the subsequent rate of memory loss. The lesson for presenters: work repetition into your presentation and your follow-up. Figure 2 shows an illustration of the Forgetting Curve and Spacing Effect.

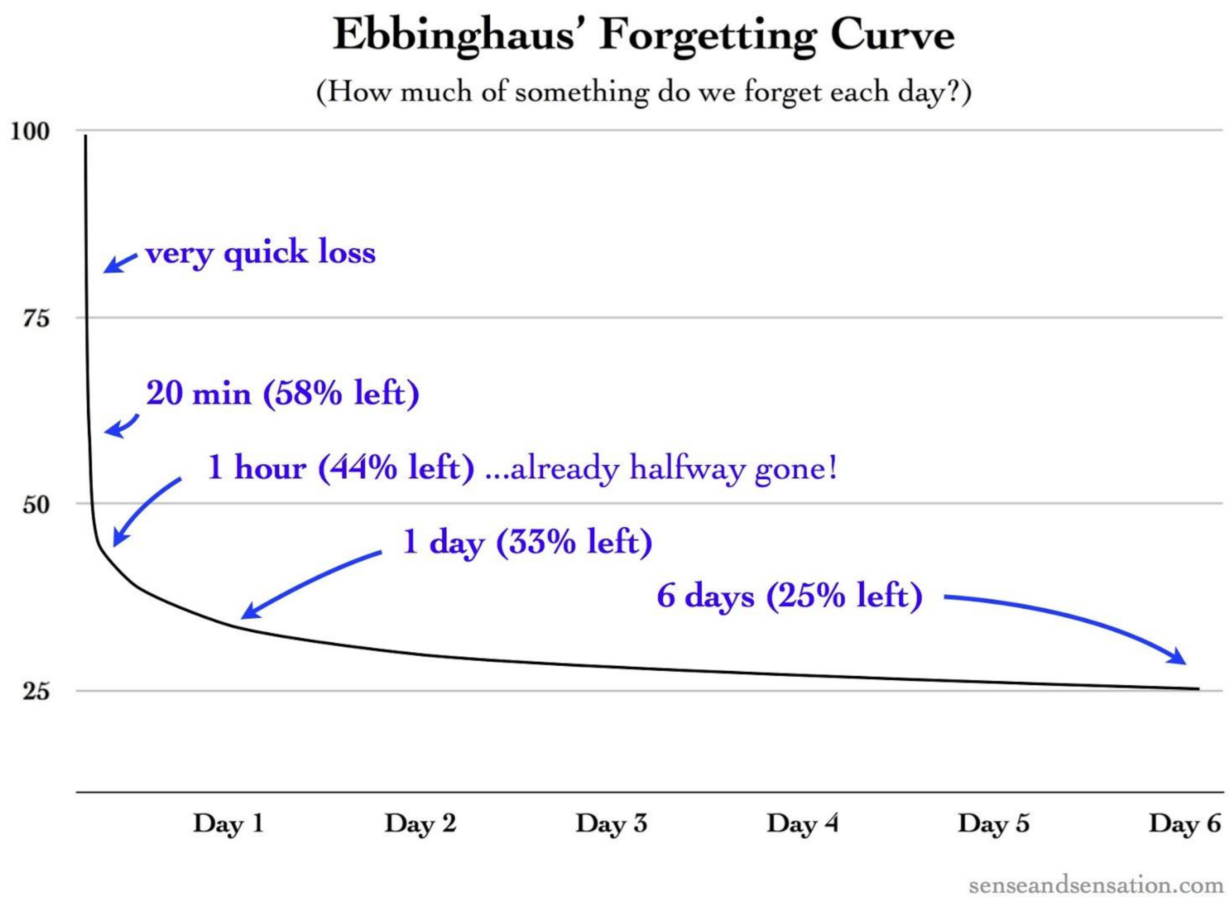


Figure 2. The Forgetting Curve

PRACTICE QUESTIONS

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Common Presentation Tools

The right tool for the job depends, of course, on the job. In this case, that means examining your audience and objective. If, for example, your task is simply to present "the facts," there's no need to consider interactive tools and techniques. If, however, your objective is to educate and/or inspire, you may want to consider a range of options for involving your audience, engaging them as participants or even co-presenters. For example, some workshops require participants—generally in group—to solve challenges or "stand and deliver." That is, to review and present a segment of the material to the audience or peers. Or perhaps your goal is to engage a group in a training or strategic planning exercise. In this case, you would want to incorporate tools that support participative learning and collaboration such as Post-sIt Note Pads, or packages of smaller note pads (don't forget markers, pens and highlighters) that can be arranged and rearranged as a pattern or plan emerges. Also consider easels, dry erase boards and other surfaces that lend themselves to idea sharing.

Whether you're presenting to a K-12, higher education, or business audience will also influence your choice of primary and supplemental tools: handouts, product samples, giveaways, worksheets, and snacks (yes, even for the adults). If your assignment is to develop and present a business presentation to be delivered to your Business Communications class peers, the topic, format and any supporting materials may be pre-defined. But don't stop there. If you're proposing an edible garden space on campus, you could make or hand out seed packets. Think about how to differentiate yourself and your proposal—whatever you're proposing—in a way that's relevant and memorable.

Similarly, if you're presenting to your management, there may be a company standard template and tools that you're expected to use. Again, you can distinguish yourself by your knowledge and application of learning and design principles. Even basic facts and figures can be rendered beautifully. Instead of handing out a hard copy of your presentation or supporting charts, graphs or worksheets, consider creating an infographic that distills the insight. For inspiration, visit David McCandless's Information is Beautiful website. To understand the possibilities for presenting complex data in a compelling manner, explore the resources on Edward Tufte's website or one of his classic books on data visualization. For perspective, *The New York Times* described Tufte as the "Leonardo da Vinci of data." Not to be outdone, *Bloomberg* labeled Tufte the "Galileo of graphics."

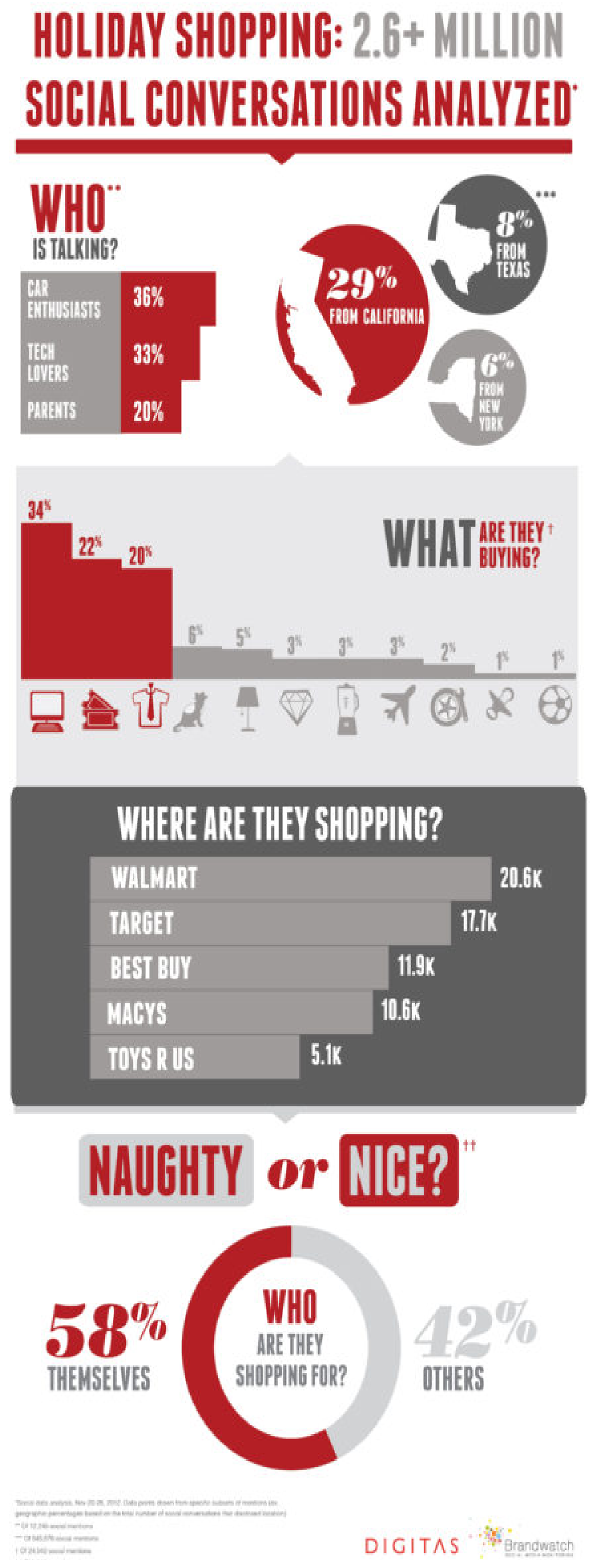

Figure 3. Infographics can be effective visual aids. Click on the image for a larger view.

PRACTICE QUESTION

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TOOLS

A short-list of possible tools include the following

- Presentation software
- Add Ins: Polling
- Handouts (i.e., infographic, quick reference)—Not your presentation!
- Giveaways
- Pens/pencils/markers
- Flip Charts
- Self-Adhesive Pads
- Dry Erase Boards
- Snacks!

Also consider logistics and technical details including the room layout, lighting, temperature controls, wifi and electrical outlets and bathroom facilities.

USING MICROSOFT POWERPOINT

What you'll learn to do: Create a presentation using Microsoft PowerPoint

PowerPoint is one of several applications in Microsoft's Office product line, including enterprise staples Outlook (email and calendar), Excel (spreadsheet) and Word (word processing).

With a market share of approximately 95 percent, PowerPoint is considered the industry standard for both business and education. PowerPoint supports over 100 languages and can be used on both Android and Mac devices. There are over 1 billion installations of PowerPoint worldwide, with 30 million presentations created daily. Similar to Kleenex for tissue, the PowerPoint brand name has become a generic reference for all presentation software and the generally poor use of this technology has given rise to the phrase “death by PowerPoint,” a scenario you will learn to avoid in subsequent sections. In this section, we will focus on the basics of creating a presentation, including how to create and save a presentation, how to change layouts and templates, how to add text, images and video and how to manage slides and objects within a slide.

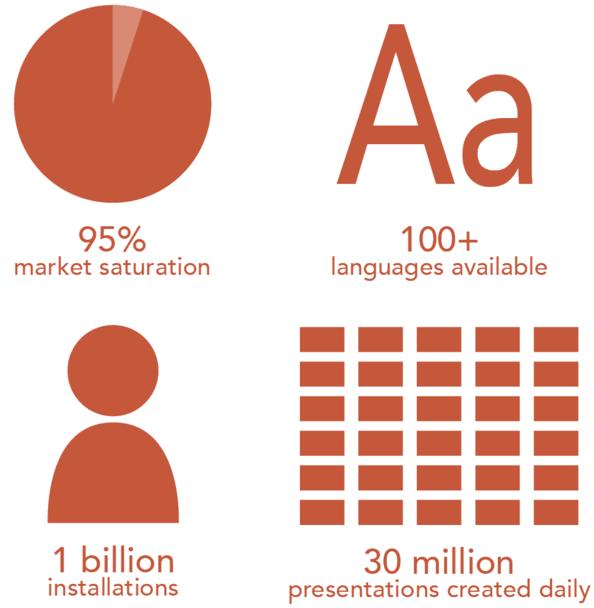
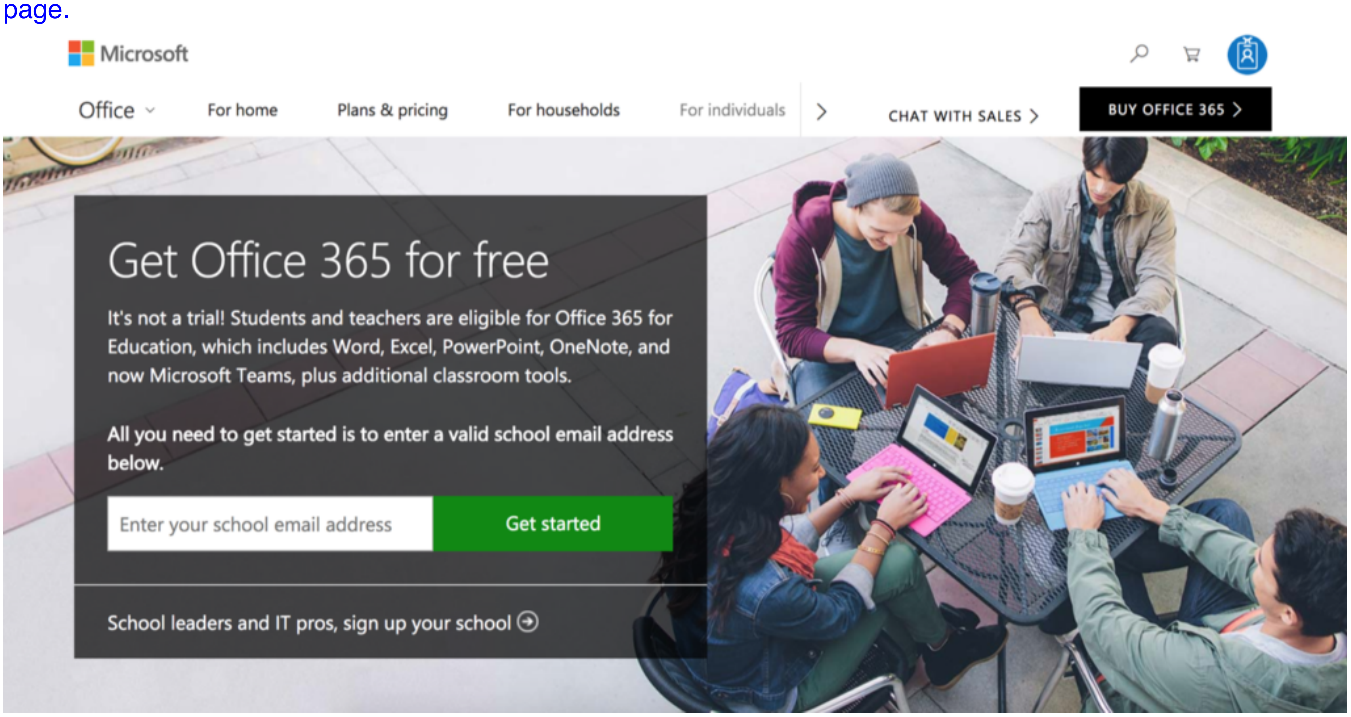


Figure 1. PowerPoint usage statistics

As would be expected, the functional layout and logic of PowerPoint is similar to other Microsoft Office programs—in particular, Word and Excel. How you access PowerPoint varies somewhat depending on the version, both the edition (year) and whether you’re using an installed package or a web-based app. The screen shots and instructions in this section are from the web-based version of PowerPoint (currently PowerPoint 2016), an app contained within Microsoft Office 365. Microsoft Office 365 is free for students and teachers. Benefits of using the web-based version include free access to the most current, fully-featured versions of Word, Excel, PowerPoint (and other apps) and automated file saving. The only requirement for a free education access is a valid school (that is, .edu) email address. Here’s the link to the Get Started web page.



LEARNING OUTCOMES

- Create and save a new presentation
- Add, delete, and move slides

- Insert text boxes
- Change theme on a presentation
- Add images and clip art
- Add videos
- Arrange objects

New Presentations

At the Microsoft Office 365 home page, you will see a selection of apps as well as any recently-viewed documents. To open PowerPoint, click on the PowerPoint icon. The PowerPoint icon style varies depending on your operating system (PC or Mac) and the version of your software, but it's always a red-orange P, sometimes accompanied by a chart graphic, as you can see circled in Figure 1.

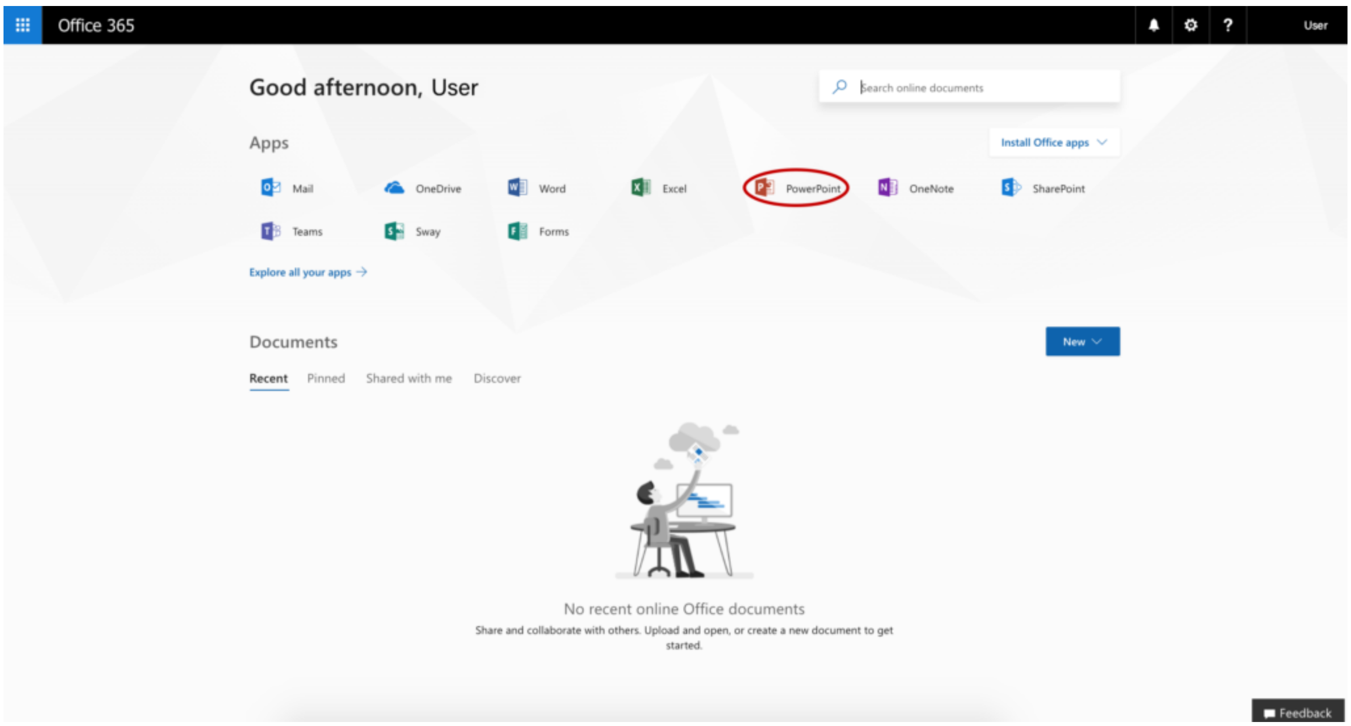


Figure 1. Accessing PowerPoint in Office 365.

When you open PowerPoint, the application will take you to a presentation gallery (see Figure 2), where you can choose to either open a new blank presentation or start a presentation using a template. To start with the proverbial blank page—no pre-set graphics, backgrounds or text—click (or double-click, depending on your version) **New blank presentation.** You'll be presented with a new blank presentation title slide containing two text boxes for a title and subtitle. These are placeholders that can be used, deleted, or simply ignored.

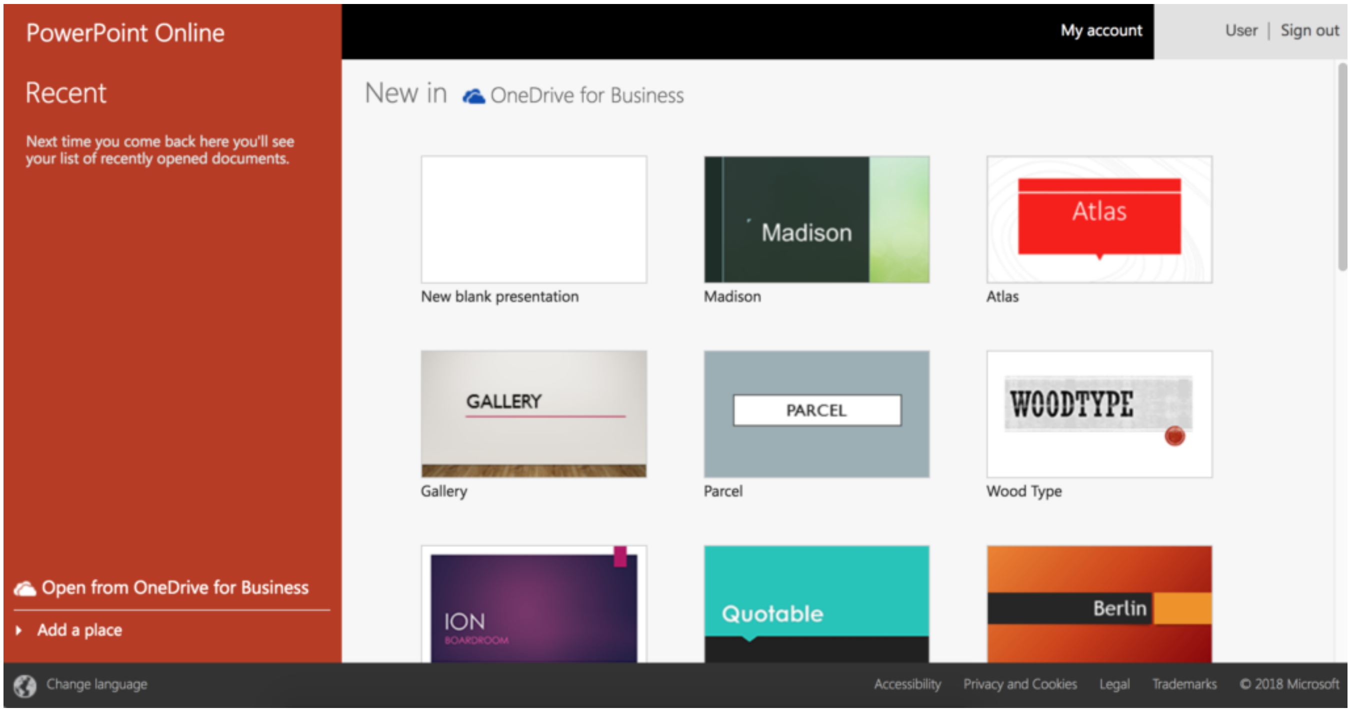


Figure 2. Template gallery.

If you want to use the default layout, click where it says **Click to add title** and type in your text. Note that when you click in the text box, the prompt text disappears and is replaced with a flashing cursor. To finish your entry, simply click outside the box. Pressing the enter or return key after typing your text will act as a return and advance the cursor to the next line. If you pressed return and don't want a two-line title, simply press the **Undo** arrow under the **File** tab at the top left of your screen (or if you're using Windows, press **Ctrl + Z** on your keyboard; if you're using a Mac, press **Cmnd + Z**). To continue adding or editing text, click the text or within another text box and continue.

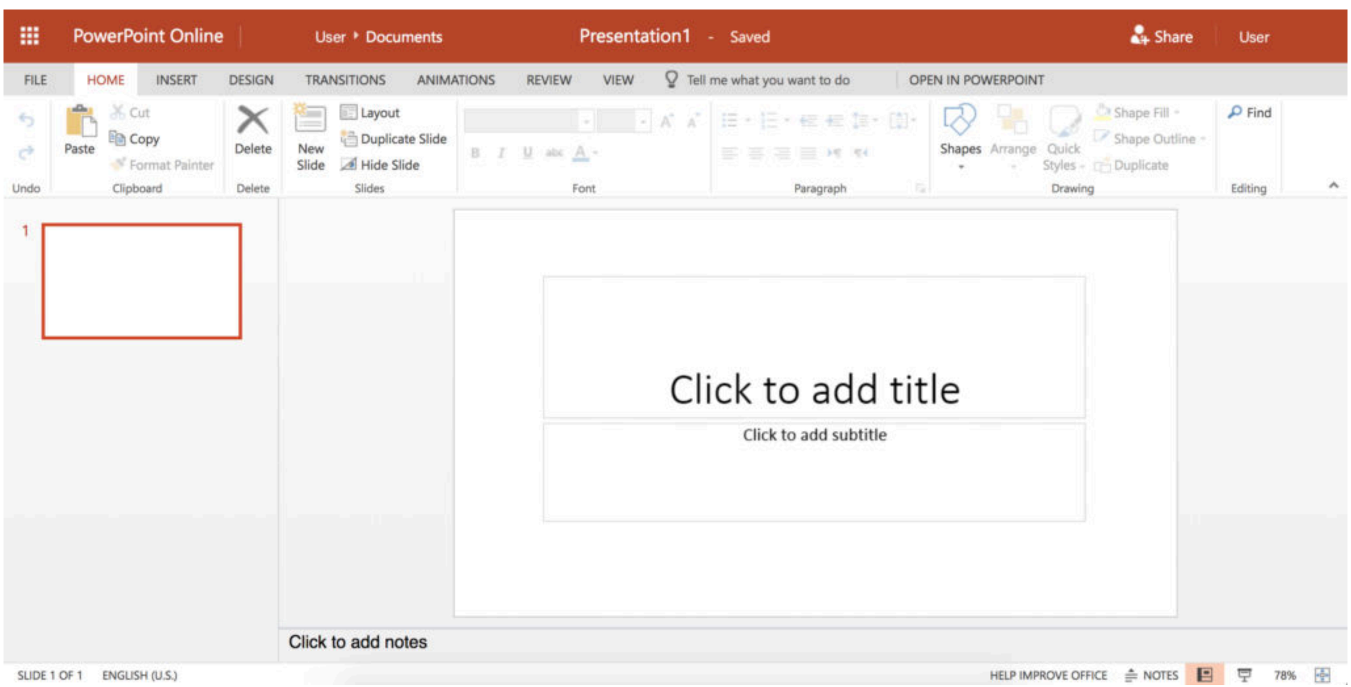


Figure 3. Your new presentation.

Placeholder boxes and prompts don't show up in Slide Show or presentation mode, so you don't necessarily need to delete those you don't use. If, however, you find them distracting, click on the border of the placeholder and press either the **delete** or **backspace** keys on your keyboard.

As mentioned above, the web-based version of PowerPoint will save your file automatically, assigning a default title of *Presentation*. If you have multiple presentations in progress, it will save subsequent files as *Presentation1*, *Presentation2*, etc. To (re)name your presentation, click the default title, type your desired title and press **enter**.

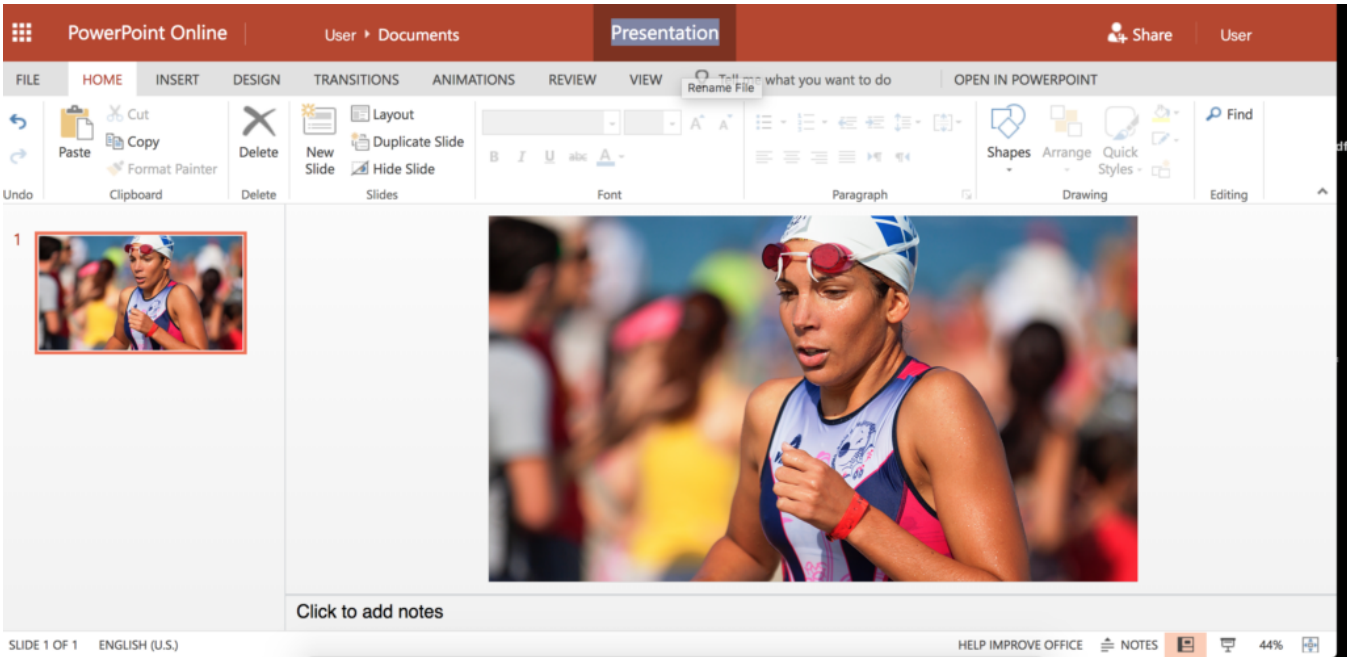


Figure 4.

Saving Documents When Working Offline

If you're not working with PowerPoint Online, you will need to save your presentation manually: click on the **File** tab.

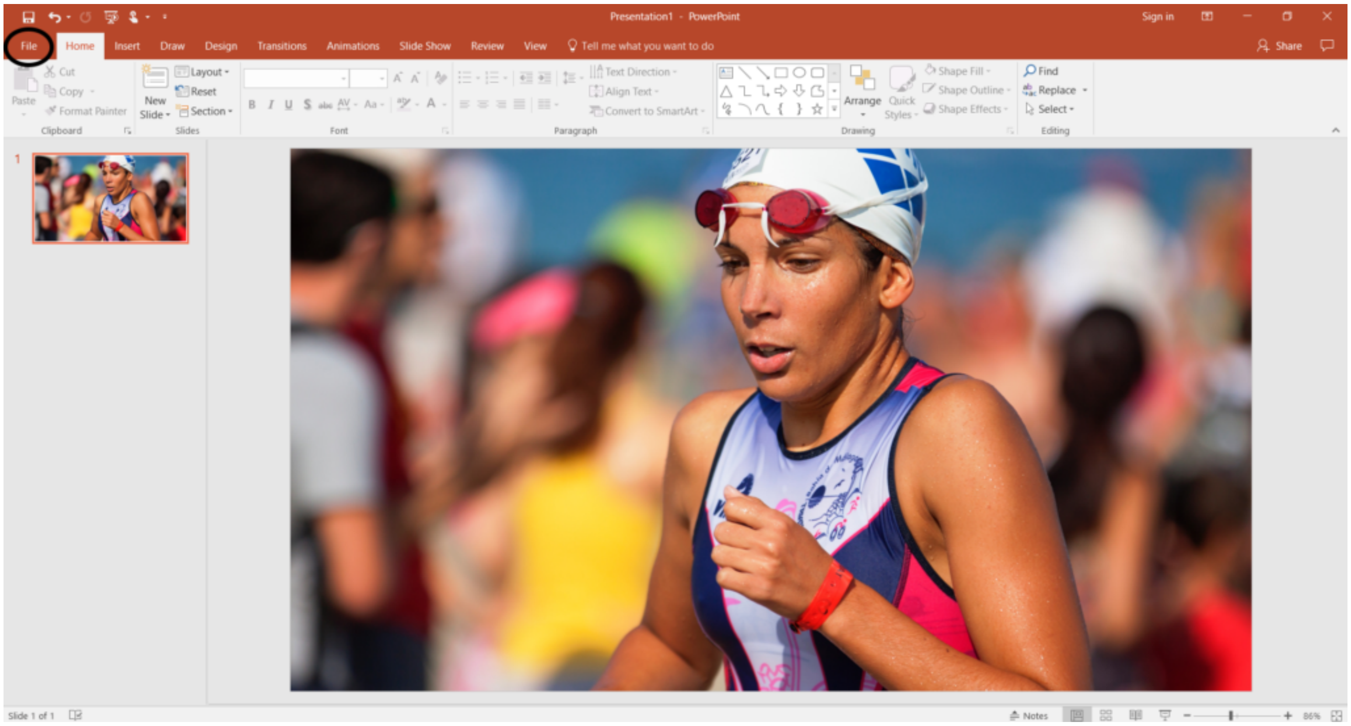


Figure 5.

You'll then click **Save** or **Save As** in the menu along the left side of the screen. Note: you can also use the common keyboard shortcuts **Ctrl + S** (Windows) or **Cmnd + S** (Mac).

Figure 6.

To save your presentation on your desktop, choose **This PC**, select my Desktop and tile your presentation—for example, "To-the-Bank Retail Trends." At this point, you will also choose the format you want to save your presentation in **Save as type**. If you will be sharing your presentation with other students or colleagues who are using an older version of PowerPoint, select PowerPoint 97-2003 as the type from the drop-down list. Otherwise, go with the default option.

PRACTICE QUESTIONS

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Now that you've created a presentation, let's start adding to it! If you closed your presentation after saving, you can reopen it by starting PowerPoint and selecting your presentation (i.e., To-the-Bank Retail Trends) listed under Recents.

Adding Slides

You can add a slide from either the Home tab, Insert tab or Thumbnail pane.

From the Home Tab

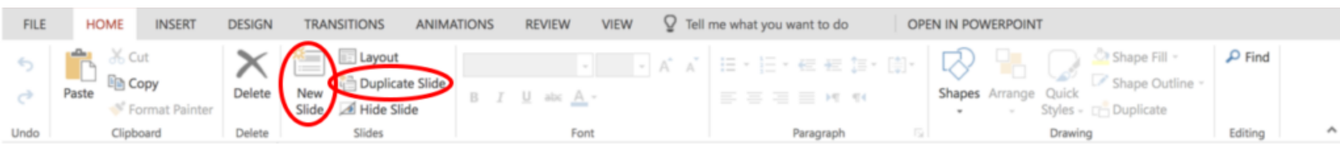
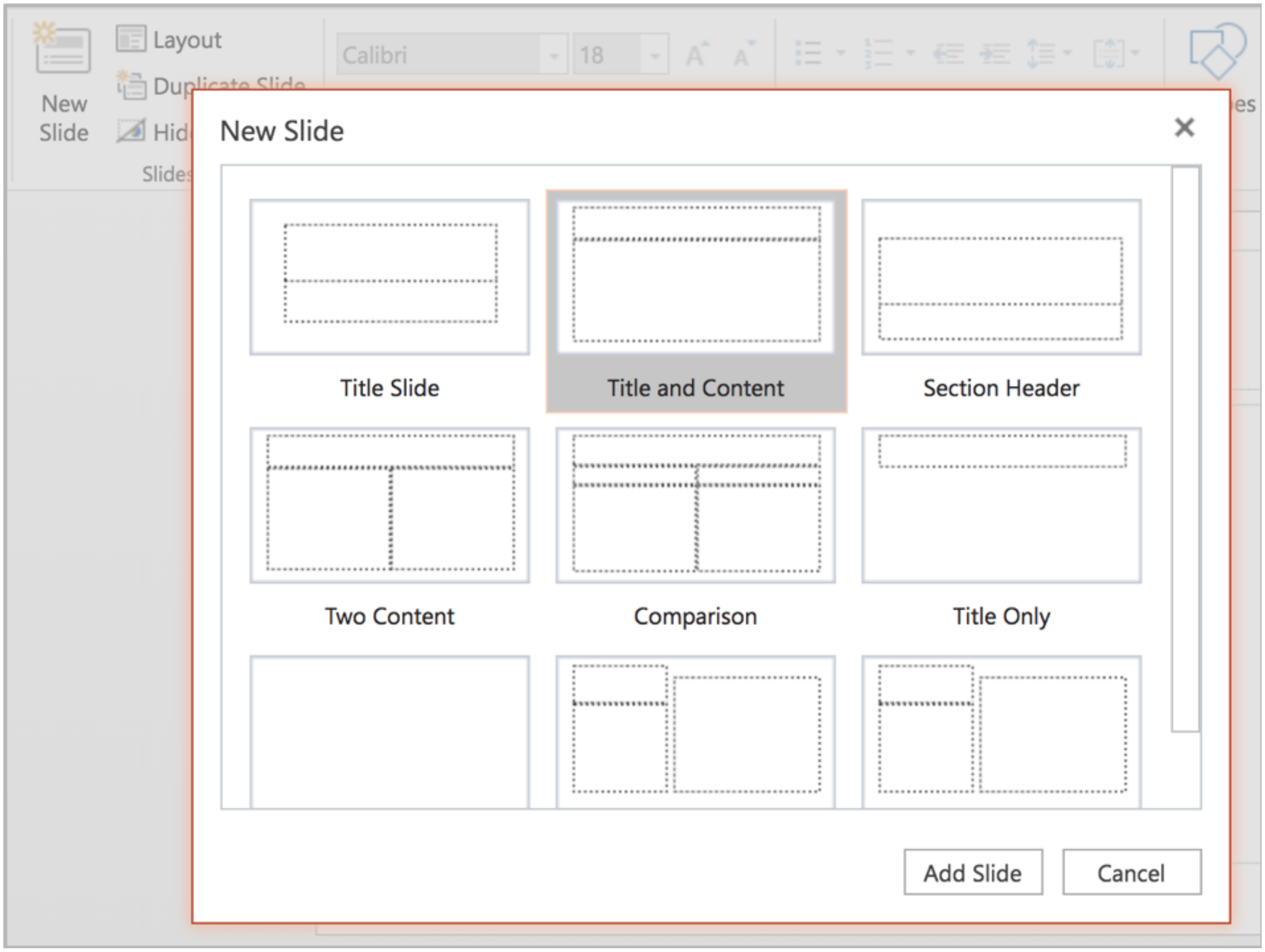
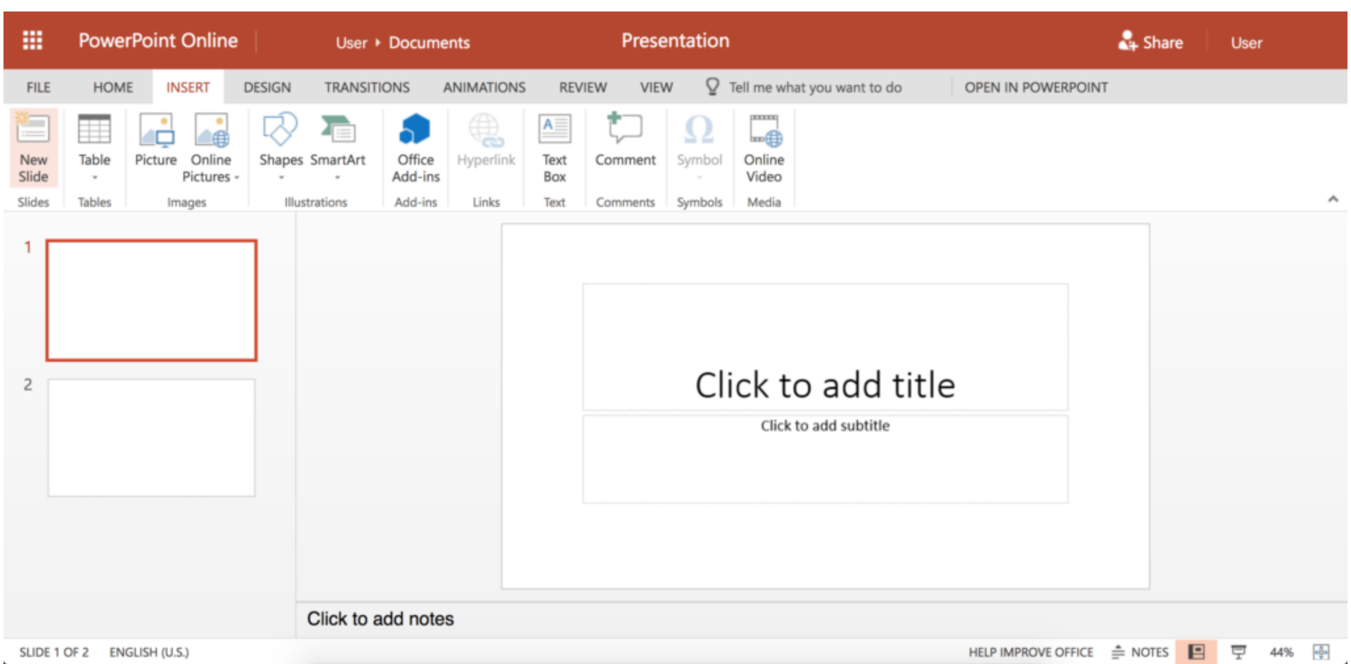


Figure 1. Home Tab.

1. Click on **New Slide** (or **Duplicate Slide**, to copy the current slide layout)
2. If you clicked **New Slide**, select a layout that best fits your content
3. Press **enter**

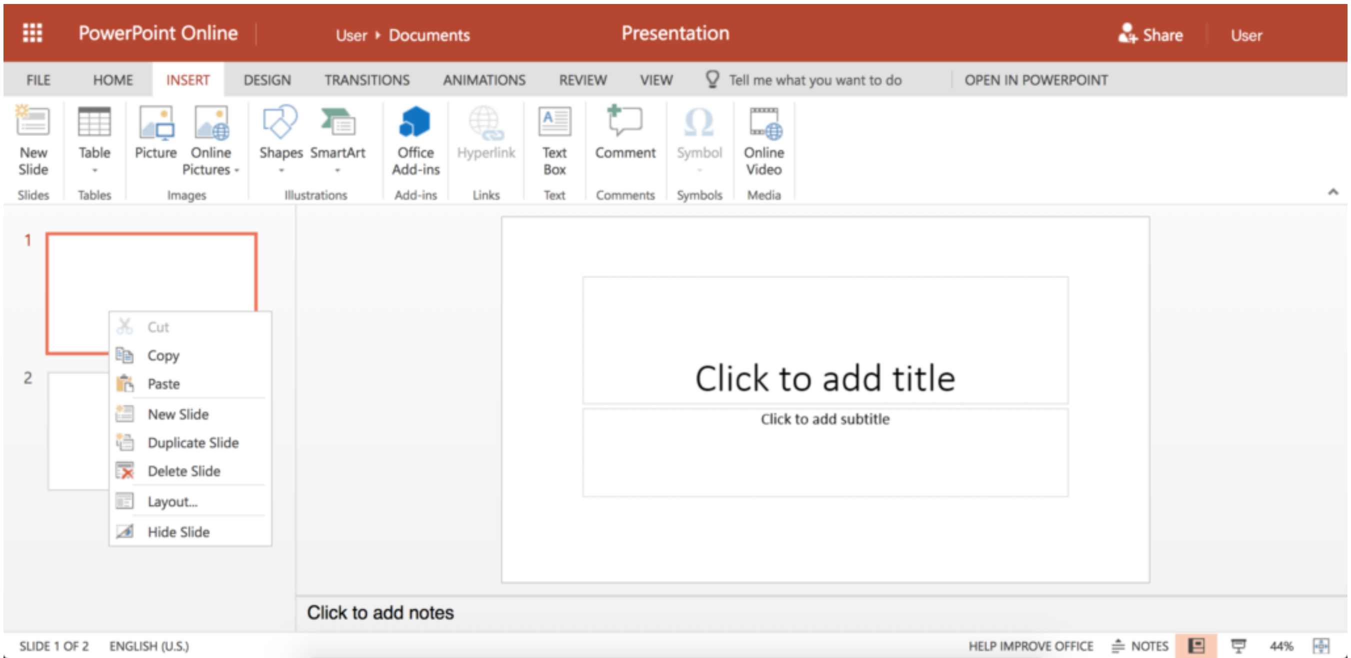


From the Insert Tab



1. Click on **New Slide**
2. Select a layout
3. Press **enter**

From the Thumbnail Pane



You can also add slides from the thumbnail pane, the lefthand column of your screen when you're in the default or Slide view.

1. Select (highlight) the slide you want the new slide to follow
2. Right-click on the slide
3. Select **New Slide** for the default content slide layout or **Duplicate Slide** to copy the slide layout and content

OR, to use a shortcut to duplicate the slide layout (not content)

1. Select (highlight) the slide you want the new slide to follow
2. Press **Ctrl + M** (PC) or **Cmnd + M** (Mac)

Note that your layout choice isn't final, so don't overthink the decision. If you're just trying to get your thoughts down on slides, select **Duplicate Slide** and fine-tune later.

Deleting a Slide

As with most operations, there are multiple ways to delete a slide:

- Highlight the slide in the thumbnail pane and press **delete**
- Highlight the slide in the thumbnail pane and press the **delete** icon (Home tab)
- Highlight the slide in the thumbnail pane, right click and select **Delete Slide**

Organizing Slides

To move a slide, simply drag and drop in the thumbnail frame.

PRACTICE QUESTIONS

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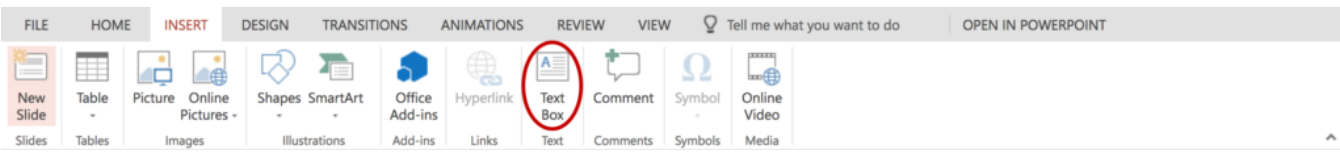
Inserting Text Boxes

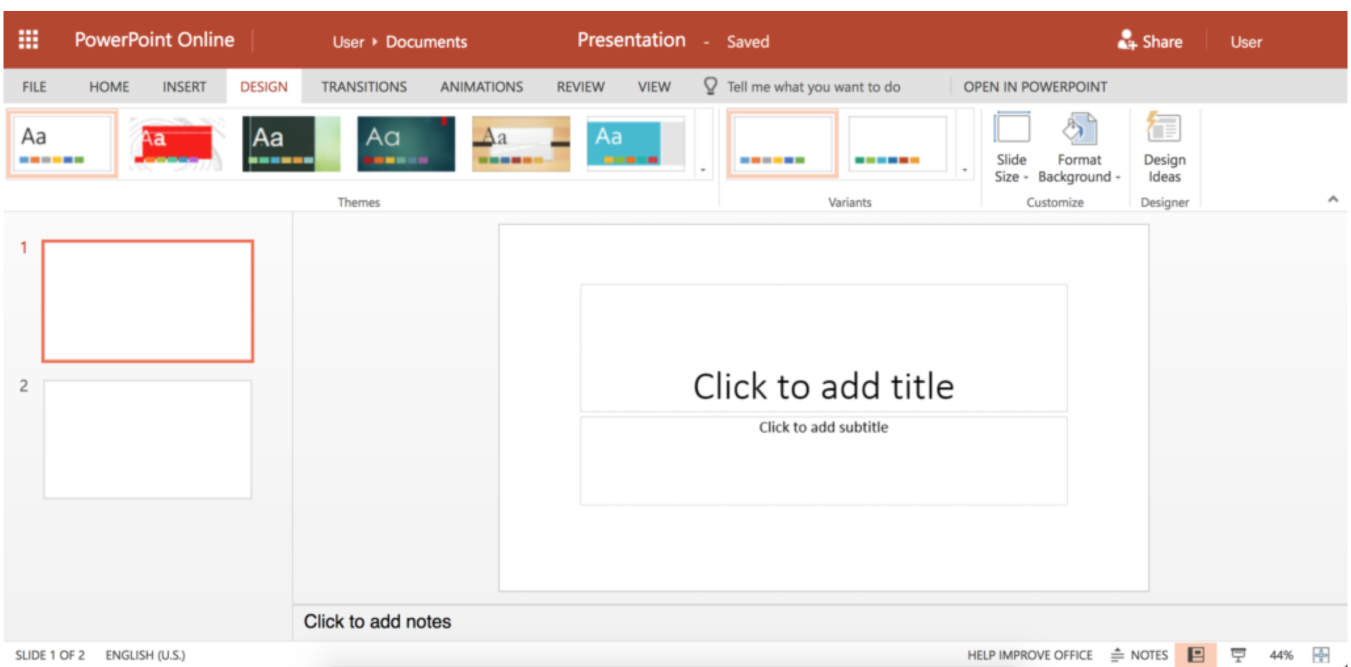
There are multiple ways to insert text into your slides. One of the ways to enter text, as discussed earlier, is to click inside a placeholder box and enter your text. However, you may want to add text to a blank slide or in a place where there is no placeholder. To do so, select the **Insert** tab on the ribbon, and choose Text Box.



A text box will be inserted in your slide with a Click to insert text message similar to the placeholder Title and Subtitle boxes discussed earlier. The text box will expand to fit your text. If you decide you want to reposition the text box, you can click and move the text box/text around the slide. If you want to modify the width of the text box, click on a corner and drag it out as desired. The circular icon at the top of the text box activates the drawing and formatting options and allows you to rotate the text box.

Changing the Theme on a Presentation

Themes are one of the formatting options within PowerPoint. A theme is a slide design that contains pre-set colors, fonts, formatting and/or images. To view formatting options, click on the design tab and scroll through the available themes.



Clicking on a theme's thumbnail applies the formatting to your slides, so you can evaluate potential fit. A second group of options in the ribbon provides color variations on that design. A third option, exclusive to the online version of PowerPoint, is Design Ideas, providing additional variations; this feature is still being built out. To revert to your original format, click Undo.

One caveat: given the limited number of templates and the number of people using PowerPoint, using a standard template doesn't do anything to distinguish you or your message. Instead of selecting a standard template, use thoughtful images and complementary fonts to add design impact.

PRACTICE QUESTIONS

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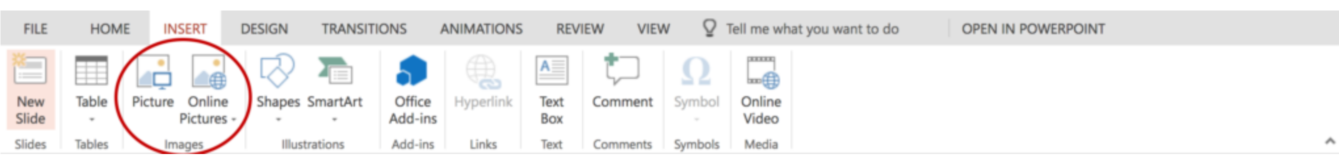
Adding Images and Clip Art

Adding art, images and photographs is a way to both personalize your slides and reinforce your message.

Adding visual elements to your slides is done from the **Insert** tab. Images can also be inserted directly from a new slide using the Add Pictures, Online Pictures or Online Video icons embedded in new slide layouts.



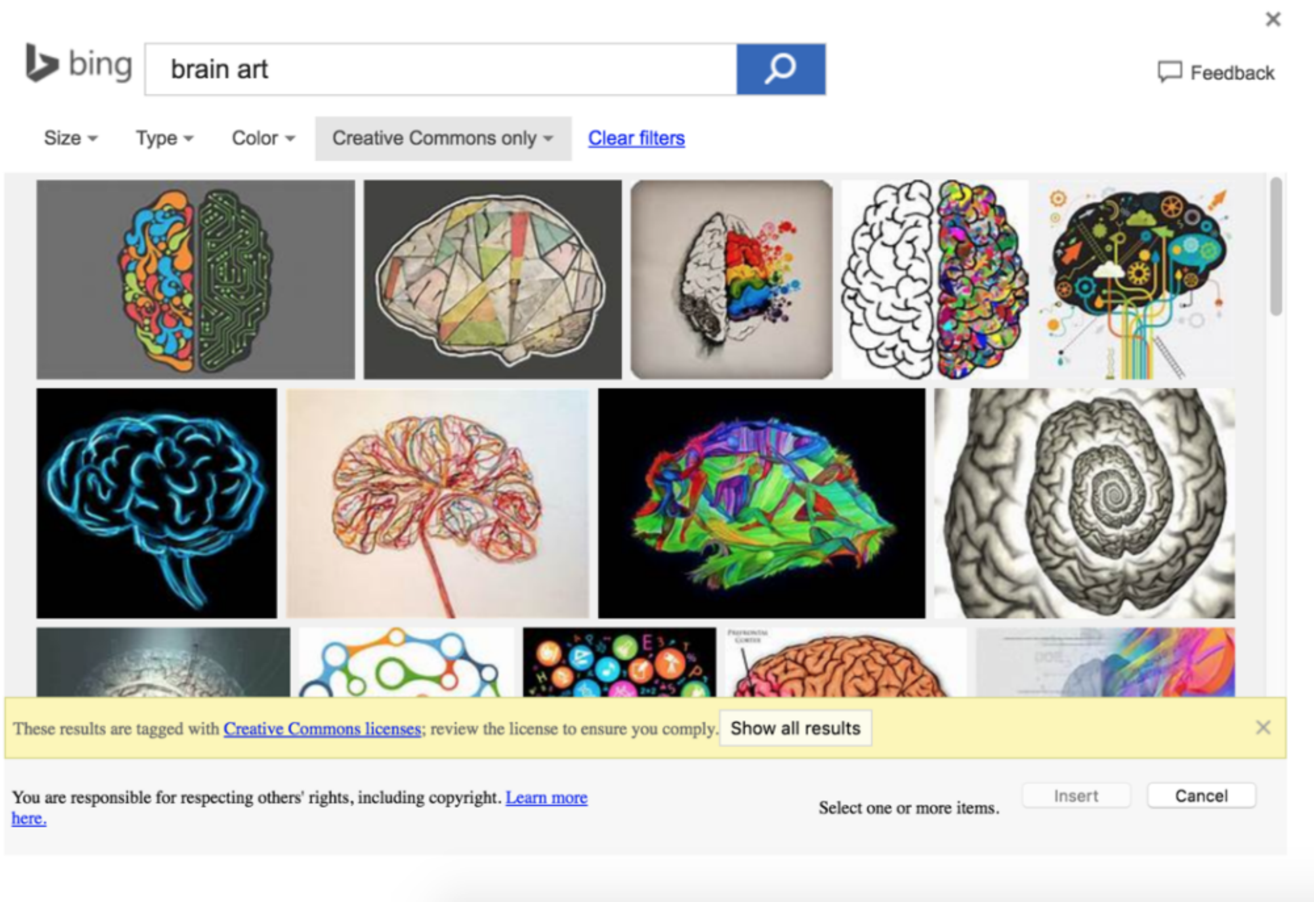
To add pictures from your computer

1. Select the **Insert tab**
2. Click on **Picture**
3. Select your desired image
4. Press **Open** to insert

The Add Pictures From the Internet option allows for two possibilitiesb: searching via Bing and uploading images from OneDrive (Microsoft's cloud storage product). Of course, you can also do an image search using Google Images or your preferred search engine, download images to your desktop and upload them to your presentation using the steps above. Don't be put off by the initial Bing images served up. Bing's filters allow you to search by size (small, medium, large, extra large), type (all, photograph, clip art, line drawing and transparent), color (all, color, B&W and by 12 basic colors) and license (all or Creative Commons only).

To add pictures from the Internet

1. Select the **Insert tab**
2. Click on **Online Pictures**
3. Type in your search term(s)
4. Refine your image search using Bing's size, type, color and license filters
5. Select an image
6. Press **Insert** to insert into slide
7. Use the corner image "handles" (small boxes) to size



PRACTICE QUESTION

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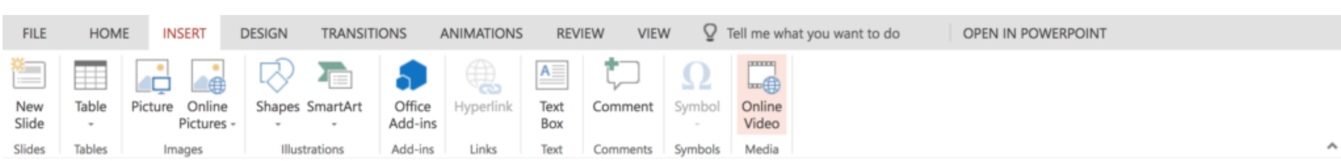
Adding Videos

Adding video allows you to incorporate both motion and sound into your presentation and this can translate into audience energy! As with other visual elements, video is an **Insert tab** command.

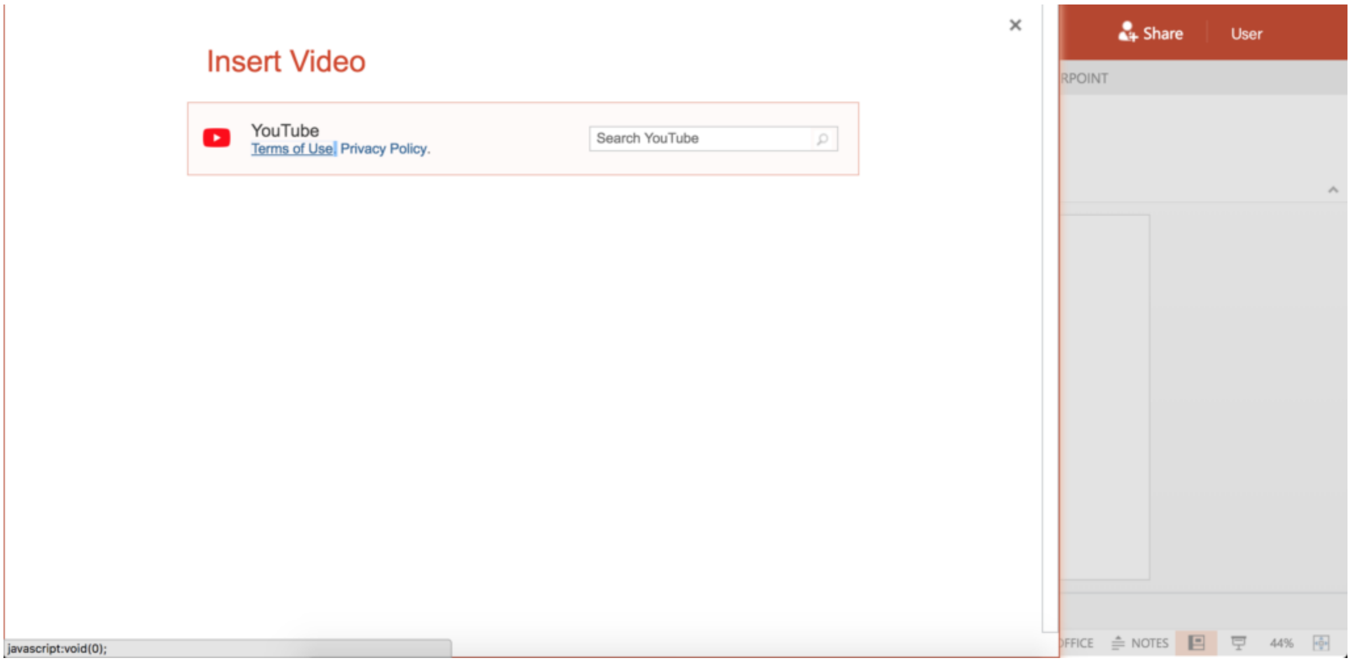


The add video command launches a YouTube video search. To see video details, hover over the video. To view the video once embedded, click on the View tab, select Current Slide and press Play.

To add video

1. Select the **Insert tab**
2. Click on **Online Video**

3. Enter your search terms
4. Select your desired video
5. Press **Open** to insert



PRACTICE QUESTION

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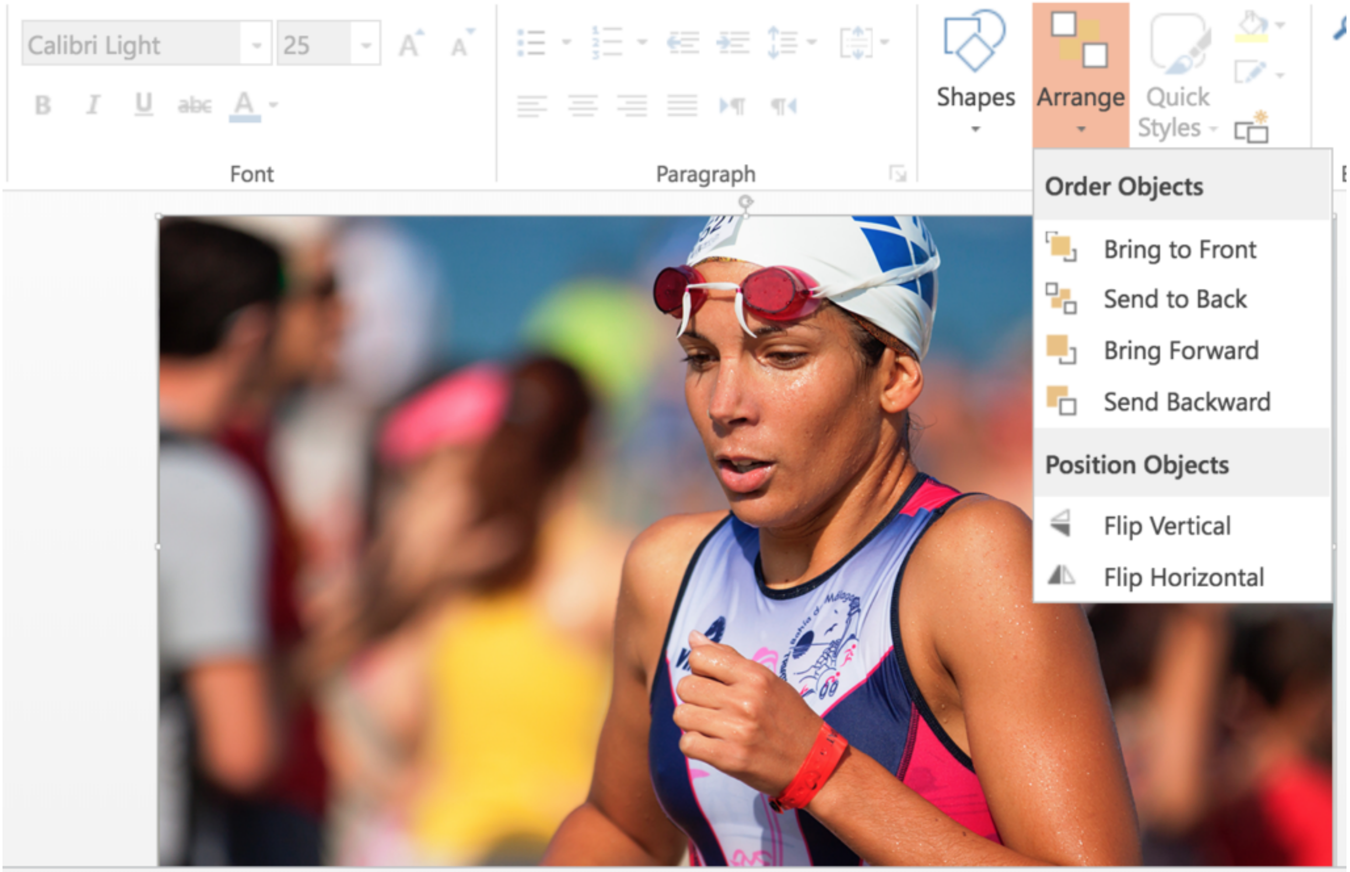
Arrange Objects

There may be times when default line spacing doesn't work or you're trying to build a slide that involves multiple blocks of text and/or imagery. That's where PowerPoint's Arrange function comes into play. Arrange allows you to order (layer) objects, bringing individual elements forward or sending them backwards. It also allows you to flip objects. Refer to Figure 4 for a screen shot.



PRACTICE QUESTION

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USING GOOGLE SLIDES

What you'll learn to do: Create a presentation using Google Slides

Google Slides is a free program that's part of Google's suite of web-based applications, including Google Docs (word processing), Sheets (spreadsheets), Slides (presentations) and Forms (collecting & organizing information). What's particularly powerful about Google Slides is that you can create, edit, collaborate and present seamlessly across operating systems and without potential file compatibility or corruption issues, managing flash drives or figuring out connector cables. Using a web-based program also eliminates the risk of transferring a virus.

It is also fairly easy to move a presentation from PowerPoint to Google Slides and back again, though you may lose some formatting in the process. If you do move a presentation, page through to make sure the slides still look the way you want them to. However, all the content should convert just fine. If you are used to PowerPoint and find yourself needing to use Google Slides (or vice versa), fear not! The commands and procedures are pretty similar between the two of them, and if you get stuck, there are lots of good online resources to answer your questions.

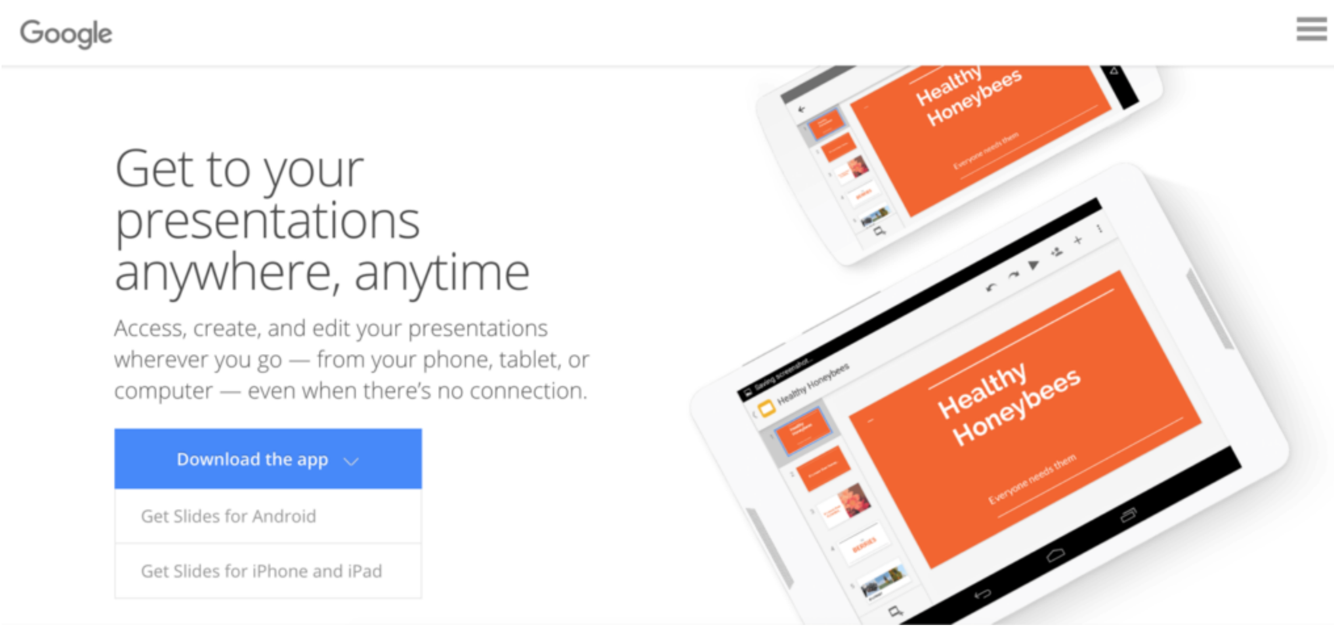

Figure 1.

For an overview of Google Slides capabilities, scroll down through the front pages on the Google Slides website.

To highlight a few key features and benefits:

- Universal access, from your phone, tablet or computer
- Support for both Android and iPhone/iPad (Google Slides apps)
- Share your presentation with options for to restrict/enable viewing, commenting and editing
- Auto-save

Embedded in Google Slides are a variety of presentation themes and templates, hundreds of fonts and support for text, images and video. You can search Google Slides template gallery for perspective or a jump start to creating your presentation. Let's jump right in!

LEARNING OUTCOMES

- Create and save a new presentation
- Add, delete, and move slides
- Insert text boxes
- Change theme on a presentation
- Add images and clip art
- Add videos
- Arrange objects

Googles Slides is free to use, but to do so requires a Google account. If you don't already have a Google account (i.e., a gmail address, Google Drive or Google Calendar), you will need to create one in order to use Google

Slides. To establish a Google account, search for “Google account” or go directly to the Google Account sign up page.

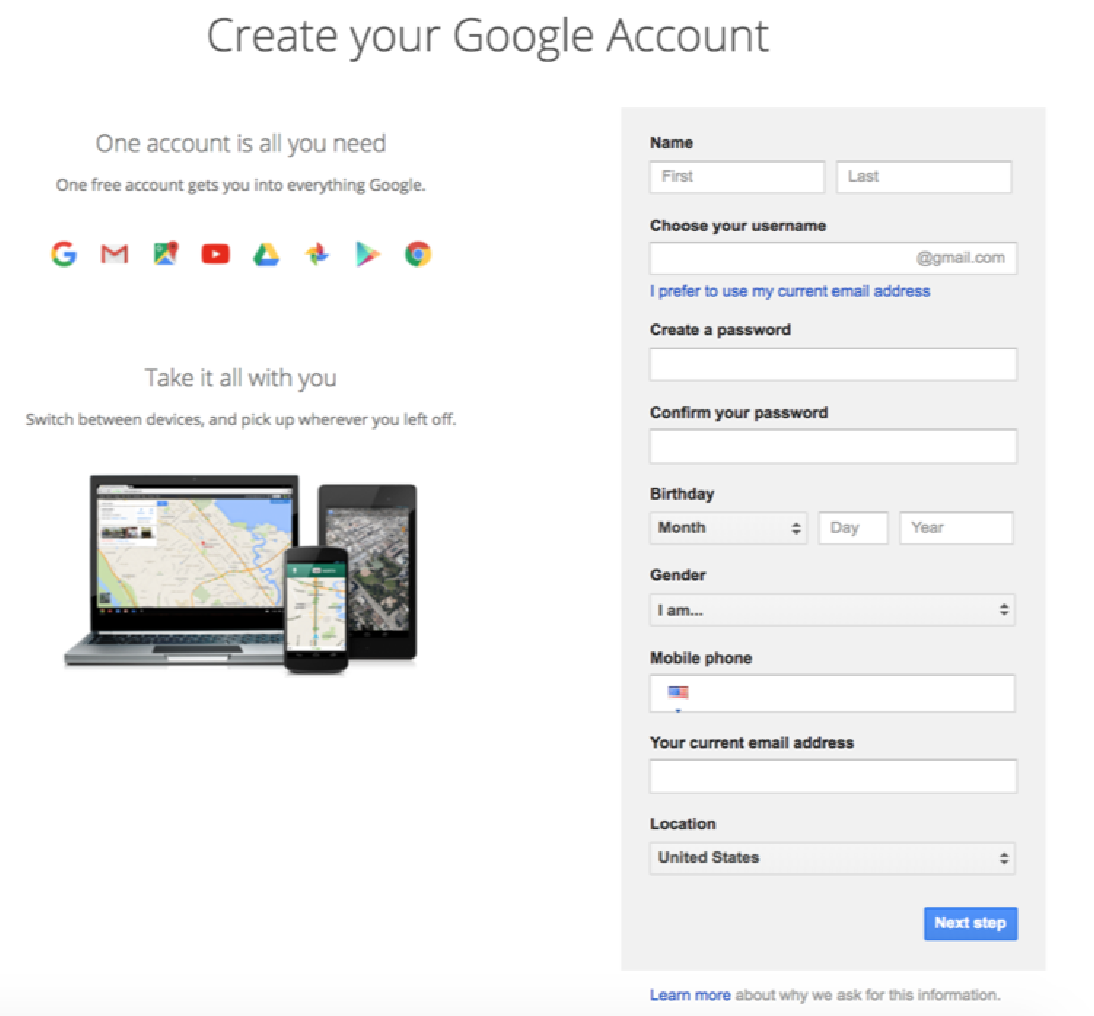

Figure 1.

New Presentations

To start a new presentation, search for “Google slides” or go to https://www.google.com/slides/about/.

See Figure 2 for a visual of the application’s opening view. You can start a new blank presentation or choose from a number of existing, editable presentations or templates. If you recently viewed a shared presentation or created a presentation, you would see it listed under Recent Presentations.

To start a new presentation, click on the plus (+) sign in the Blank Presentation box.

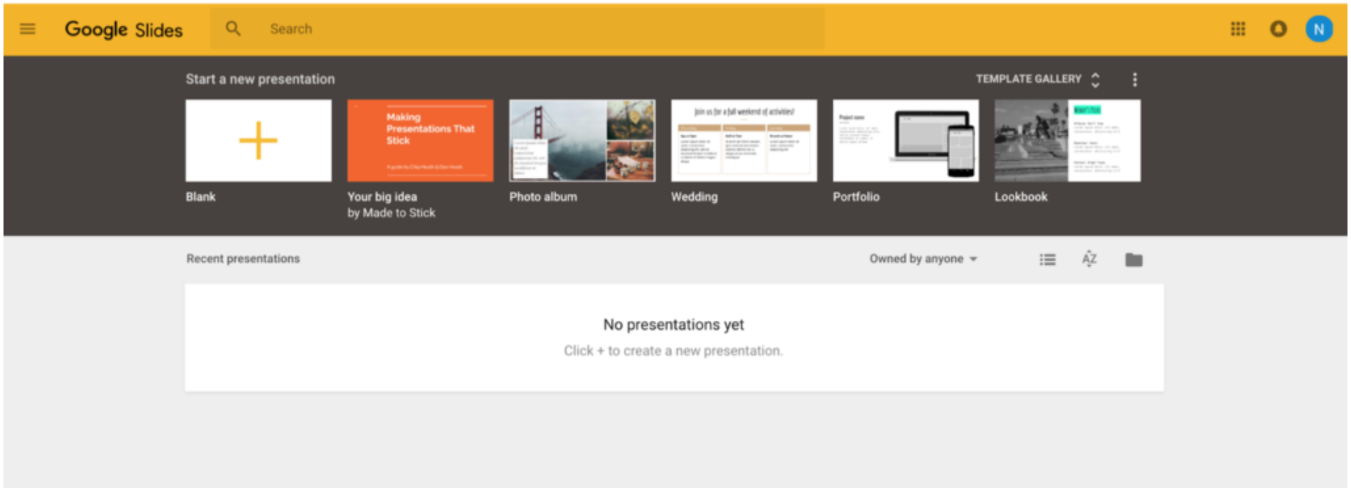

Figure 2.

Within Google Slides, as in all Google applications, your work is saved automatically. Until you name your presentation, it will save as Untitled presentation.

To title your presentation, click in the [Untitled Presentation] box and type your desired title. By default, Google slides will insert the text from the title box as the title; you can accept that or delete and enter an alternate title (see Figure 3).

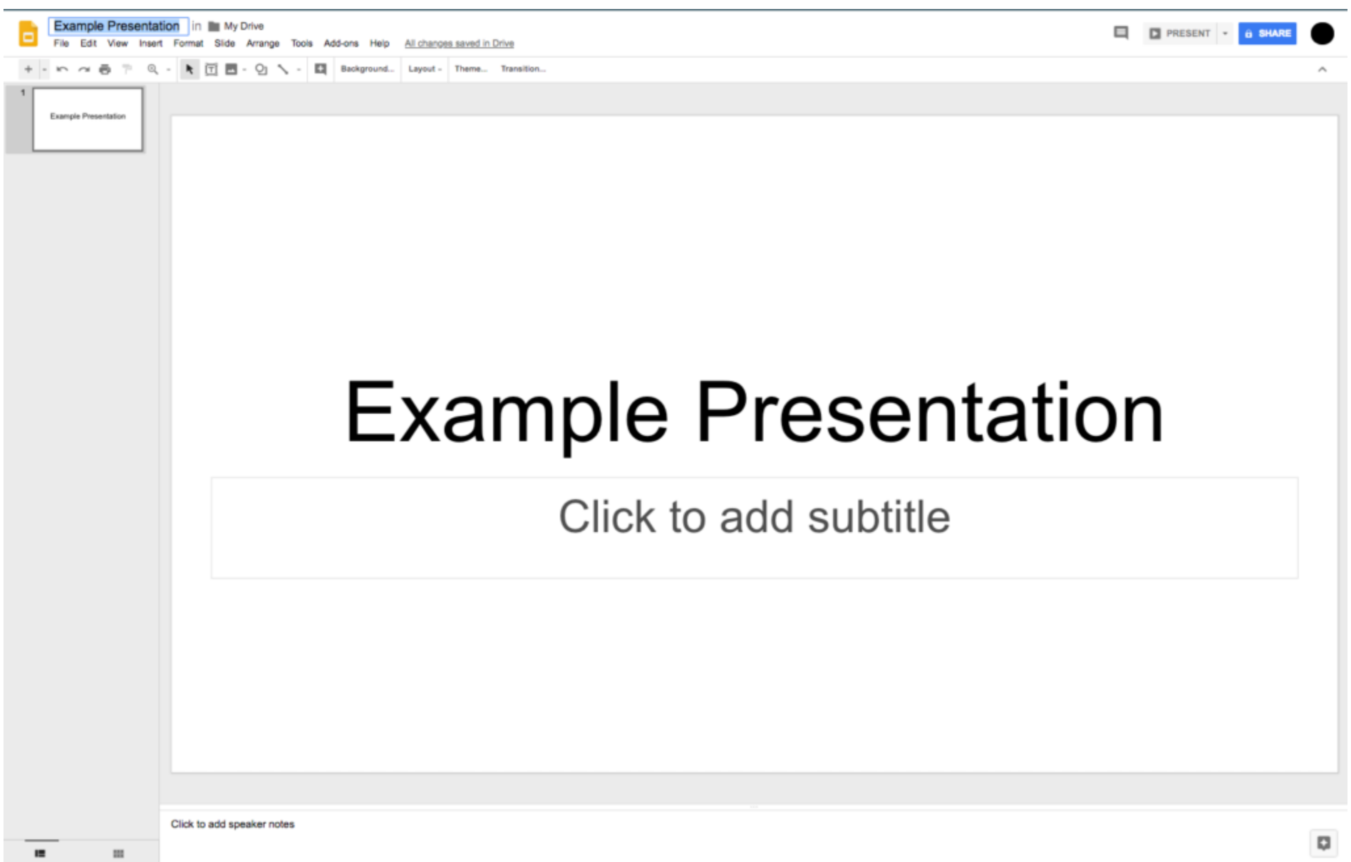

Figure 3.

PRACTICE QUESTION

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Organizing Slides

There are multiple options for adding slides:

- Select "+" (New slide) from the second menu line. To select a specific slide layout, use the dropdown menu to the right of the slide to add a slide that best matches the content for that slide
- Use the New slide shortcut: Ctrl+M
- From the Insert dropdown, select New slide (Ctrl+M) Select Insert > new slide
- Select Slide > Duplicate slide, which will copy the slide that's currently highlighted in the thumbnail section in the left column of the screen
- Right click in a slide in the thumbnail sidebar and select New slide or Duplicate slide

To delete a slide, right click on the thumbnail image and press delete OR delete from the Slide dropdown: Slide > Delete slide. If you delete a slide in error, don't panic! Click on the Undo arrow or use the Ctrl+Z shortcut.

To move a slide, click on the slide in the sidebar—this will highlight the thumbnail—and drag it to where you want it to appear. A second sorting option is to shift from the default ("Filmstrip") view to Grid view—View > Grid view—and use a select, drag and drop method. You can toggle between the default and Grid view by selecting the icons at the bottom of the thumbnail window.

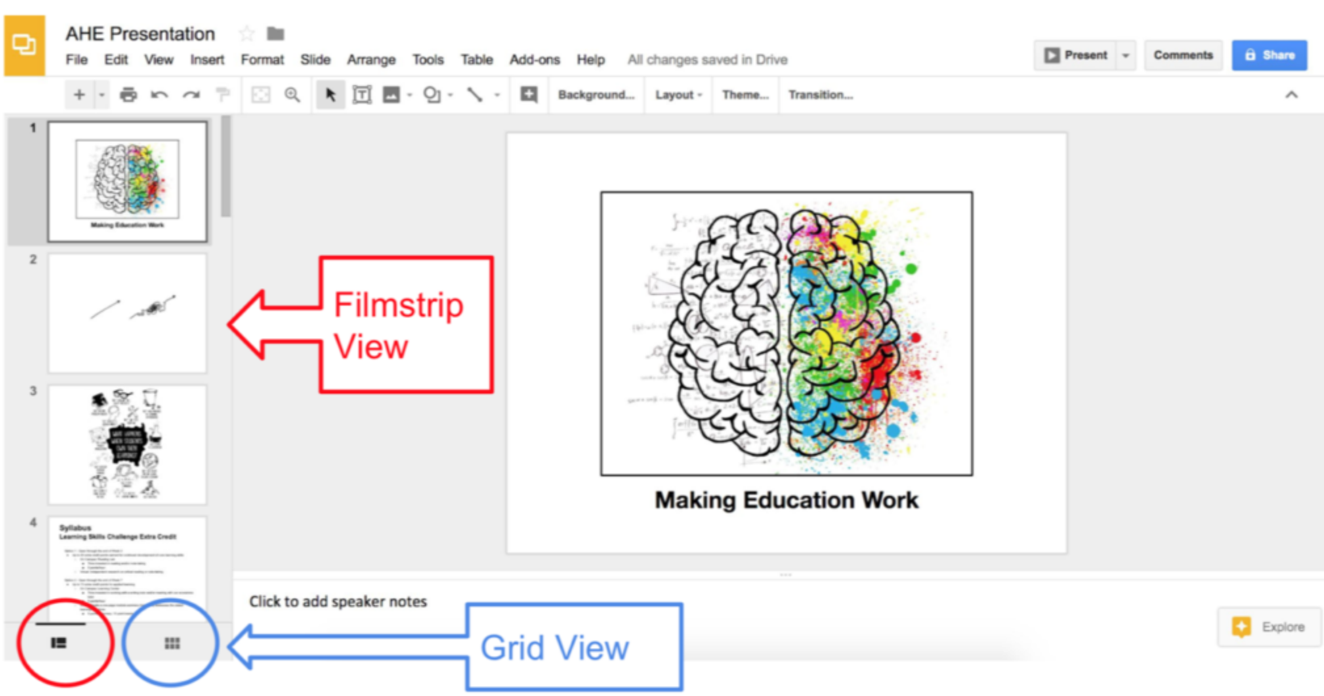

Figure 4.

TRY IT

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Text Boxes

As with most actions in Google slides, there are multiple was to add a text box:

- Select the Text box icon from the main menu (see Figure 1).
- Select Insert > Text Box.

Using either method, your cursor will become a crosshair; position your cursor where you want the text box to start and click to anchor. Drag the cursor the approximate width and length of your anticipated text entry and release the cursor. If you want to change the location of the text box, click within the text box to highlight it and use the arrow keys on your keyboard to reposition. To change the box dimensions, click within the text box (if it's not already highlighted) and hover over one of the anchor points (tiny boxes). A directional arrow will appear; click to stretch or reduce the size; release when complete.

To delete a text box, select to highlight and press delete. If you change your mind, click on the Undo (Ctrl+Z) arrow.

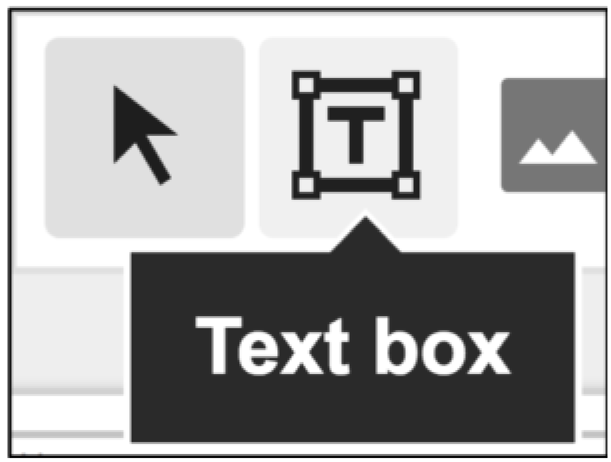

Figure 1.

PRACTICE QUESTION

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Themes

Themes are one of the formatting options within Google Slides. To view theme options, click on Slide > Change theme. A column will appear on the right of the screen, showing various color, layout and font options. To see how a particular combination would work with your content, click on your chosen theme. You can continue test-driving themes; clicking on a new theme will replace the prior choice. There's no risk of losing your original formatting; Undo (or Ctrl+Z) will return you to your original theme. You can also import a theme from outside Google Slides. Click on the Import theme button at the bottom of the themes column. Sites such as Slides Carnival allow you to copy slide formats directly into Google Slides.

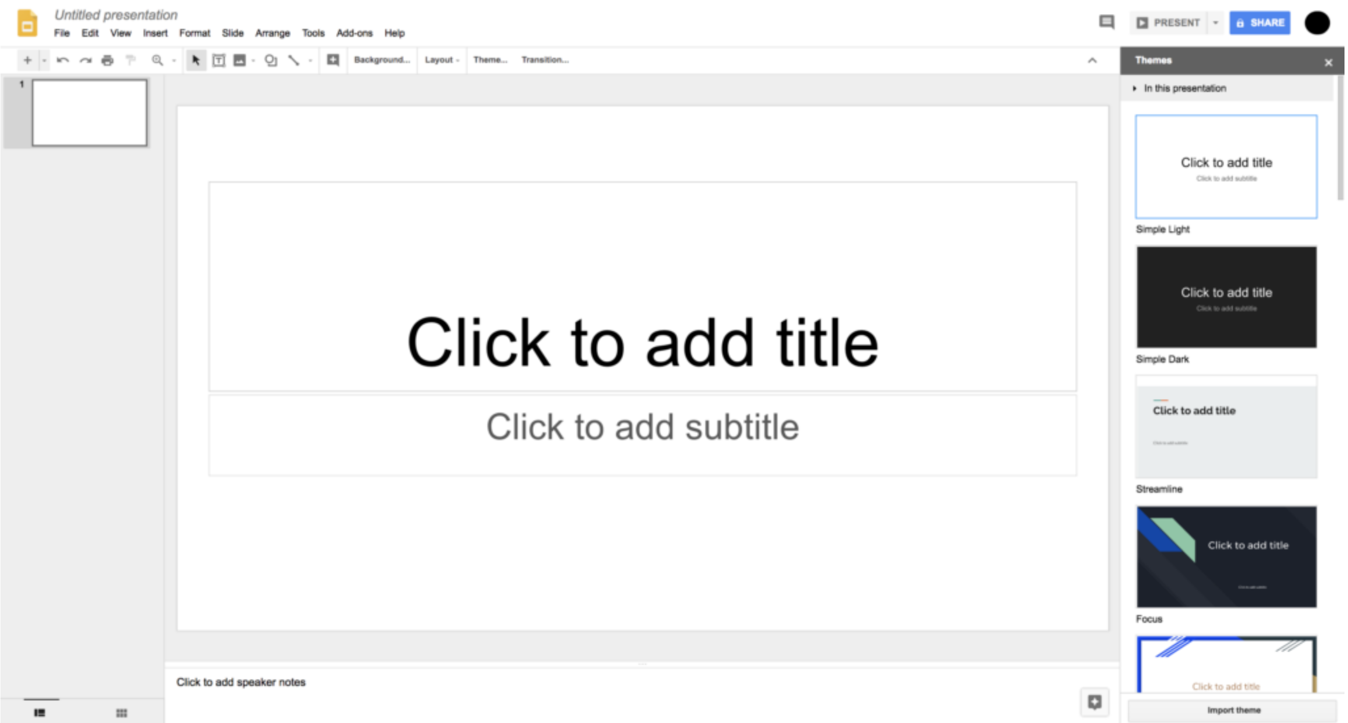

Figure 2.

PRACTICE QUESTION

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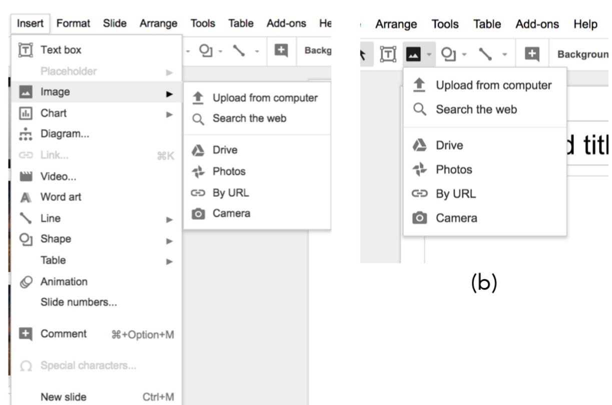
Images and Clip Art

Using art and images adds impact and provides welcome relief to the challenge of processing information-intensive slides. To insert an image, select Insert > image or the image icon, to the right of the Text box icon. As shown in Figure 1, there are multiple options for accessing images; you can also access these options using the drop-down menu to the right of the Image icon. You can upload images from your computer, use the camera on your device to take a photo, link to an image using a URL, or Search Google Images. Selecting Search the Web will link you to Google Images, where you can use a keyword or keywords to search for images, including quote images based on your keyword(s).



(a) (b)

Figure 1.

When your results appear, you'll see a small magnifying lens in the bottom right corner of the images. Clicking on the magnifying lens allows you to preview the image prior to selection/inserting. To exit preview (if you don't want to choose this image), press the left (return) arrow to return to the search options.

To select an image, click on it and click on the INSERT button at the bottom of the window. The image will be inserted into your current (highlighted in the thumbnail) slide. If you change your mind, press the escape key (ESC), Undo, or Ctrl+Z to reverse the Insert operation.

To incorporate clip art, select Insert > Image to open the Google Image browser. In the Search area "Search for Google Images," enter your keyword or desired image and clip art as your search terms. For example, "brain clip art" or "brain + clip art." For more professional images, include "stock" – stock image or stock photo – in your search. For example, "brain stock image."

Images shown are generally in the public domain or labeled for commercial use with modification, but as the disclaimer on the Google Image window notes, you are responsible for ensuring that your intended use is in accordance with the image creator's license.

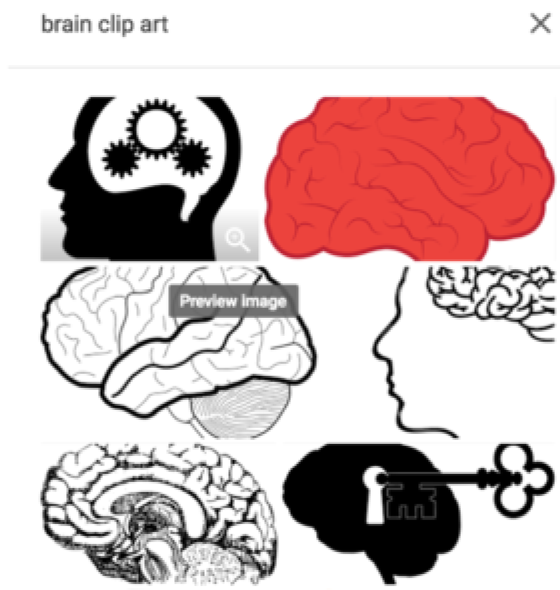


Figure 2.

PRACTICE QUESTION

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Videos

Adding video to your Google slides adds yet another level of visual interest and engagement. To incorporate video:

1. Select Insert > Video from the main menu. A window will appear where you can search for a YouTube video, or you can select URL at the top of the window, and paste a URL for a specific YouTube video.
2. Click on a video to select it and press the Select button to embed it in your current slide. Your video is now embedded in your slide.

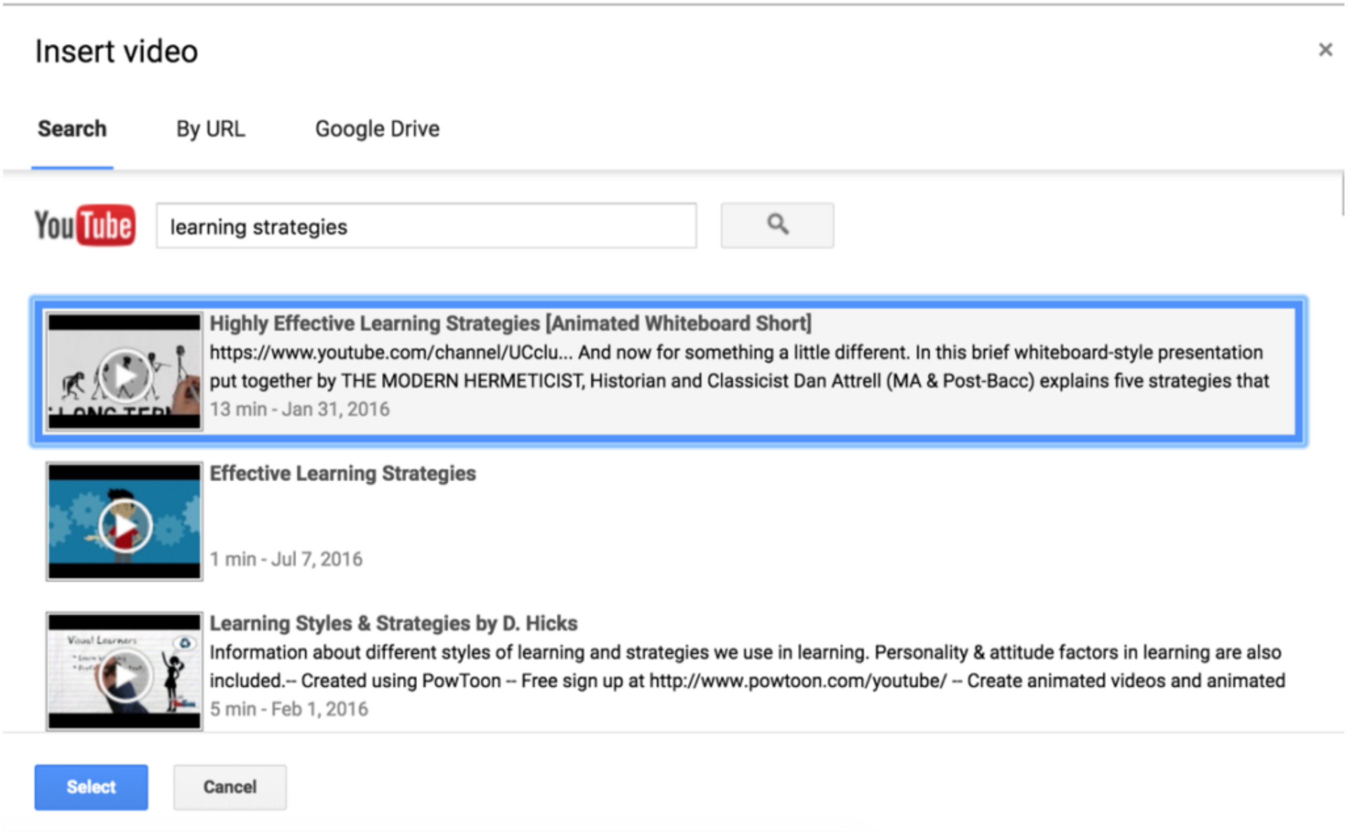

Figure 3.

PRACTICE QUESTION

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Arranging Objects

When you're creating a slide with multiple elements—for example, layering text, imagery, lines, shapes or other objects—you may find a need to arrange the elements or objects.

To manage objects on a slide:

1. Click Arrange from the main menu.
2. Choose from the following options:
    - Order: Put the object behind or in front of text, other objects, or images.
    - Align horizontally or Align vertically: When you select multiple objects, you can align the edges of the objects.
    - Center on page: Center objects vertically or horizontally on a slide.
    - Rotate: Change the orientation of an object, by flipping or rotating it.
    - Distribute: When you select three or more objects, you can evenly distribute the space between them.
    - Group: Lock multiple objects together to make them easier to move around and format.

The Google Slides grid line feature, enabled by default, also provides a visual to help with alignment. When you click and drag an object, you will see colored lines appear that will help you align the object with other objects on the page. This setting (View > Snap to > Guides) is selected by default.

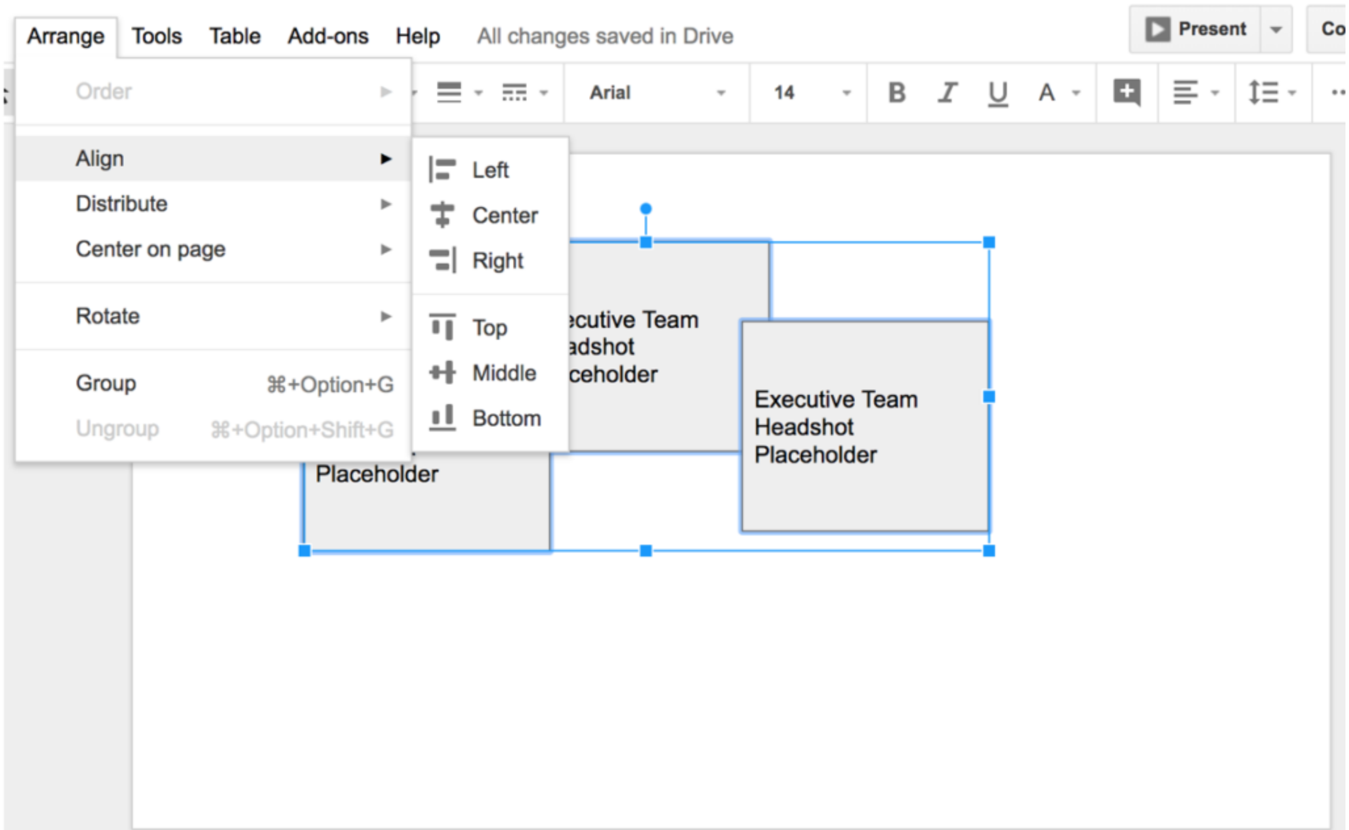

Figure 4.

PRACTICE QUESTION

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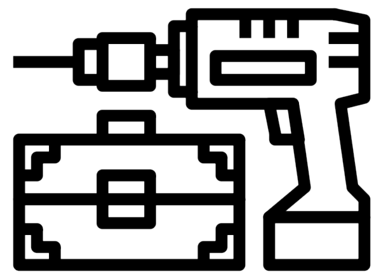
MAKING A PRESENTATION FOR A MEETING

What you'll learn to do: Create a presentation intended for a business meeting

Tools, no matter how sophisticated, are simply tools. Moving from the right tools to a good presentation involves perspective and planning. For perspective, we'll approach the concept of a good presentation from two standpoints: identifying the key features of a good presentation and common mistakes that contribute to presentation failure. We'll also discuss what's involved in the planning process, including the three essential questions that need to be answered prior to developing content. Finally, we'll explore the classic story structure and apply that structure to a business presentation scenario.



LEARNING OUTCOMES

- Identify key features of a good presentation
- Identify the purpose, audience, and message of your presentation
- Discuss common mistakes in presentations
- Create a presentation intended for a business meeting

Parts of a Good Presentation

Like reverse engineering a product, we can distill the key features of a good presentation by looking at presentation evaluation scorecards. Refer to Table 1 for a sample class presentation grading rubric.

Table 1. Presentation Grading Rubric			
Criteria	Rating		Pts
Overall communication effectiveness. *Presentation reflects thoughtful planning (content) and development (structure) and engaged delivery (style)*	10 pts (Full Marks)	0 pts (No Marks)	10 pts
Presenter has a unique voice and compelling message.	10 pts (Full Marks)	0 pts (No Marks)	10 pts
Presentation reflects learning. *Content reflects knowledge and thoughtful development of subject. Speaker applies communication concepts learned and/or incorporates relevant terminology. Points are supported by credible sources/data.*	50 pts (Full Marks)	0 pts (No Marks)	50 pts
Slides reflect thoughtful design. *Slides reflect an understanding of and ability to apply design best practices (i.e., 10-20-30 rule; "bullet points kill")*	20 pts (Full Marks)	0 pts (No Marks)	20 pts
Presentation meets stated requirements. *Presentation meets subject matter, research, length & formatting (including citation) requirements.*	10 pts (Full Marks)	0 pts (No Marks)	10 pts
Total Points: 100			

At the macro level, the key elements of a good presentation are content, organization, and delivery. There are both substance and style aspects of content. Substance elements include the originality and significance of your idea, the quality of your research and analysis, clarity and potential impact of your recommendations. Style aspects of content include confidence and credibility, both of which have a significant impact on how you—and your message—are received.

Good organization starts with a strong opening and continues in a logical and well-supported manner throughout the presentation, leading to a close that serves as a resolution of the problem or a summary of the situation you've presented. The audience experiences good organization as a sense of flow—an inevitable forward movement to a satisfying close. This forward momentum also requires audiences to have a certain level of technical and information-management competency. To the latter point, good presentation requires a presenter to put thought into information design, from the structure and content of slides to the transitions between individual points, slides and topics.

Delivery entails a range of factors from body language and word choice to vocal variety. In this category, your audience is responding to your personality and professionalism. For perspective, one of the three evaluation categories on the official Toastmasters speaker evaluation form is "As I Saw You;" in parentheses: "approach, position, personal appearance, facial expression, gestures and detracting mannerisms." A good presenter has a passion for the subject and an ability to convey and perhaps elicit that emotion in the audience. Audience engagement—through eye contact, facial expression, perhaps the use of gestures or movement—also contributes to an effective presentation. However, to the point in the Toastmasters evaluation, gestures, movement other mannerisms can be distracting (see Module 7: Public Speaking for more on this). What works: natural (not staged) movement that reinforces communication of your idea.

With those key features and presentation-evaluation criteria in mind, let's add a disclaimer. The reality is that your features won't matter if you don't deliver one essential benefit: relevance.

Whether you think in Toastmasters terminology—"What's in it for me? (WIIFM)" from the audience perspective—or put yourself in the audience's position and ask "So what?," it's a question that you need to answer early. We'll get into this more in the next section as we discuss presentation planning.

Figure 1. The WIIFM Principle.

PRACTICE QUESTION

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What's My Presentation About?

It may be helpful to think of your presentation as having three key moving parts or interlocking gears: purpose, audience and message. Let's walk through the presentation-development process at this planning level.

Purpose

Generally the first step in developing a presentation is identifying your purpose. Purpose is a multi-layered term, but in this context, it simply means objective or intended outcome. And why is this? To riff on the classic Yogi Berra quote, if you don't know where you're going, you might as well be somewhere else. That is, don't waste your audience's (or your own) time.

Your purpose will determine both your content and approach and suggest supplemental tools, audience materials and room layout. Perhaps your purpose is already defined for you: perhaps your manager has asked you to research three possible sites for a new store. In this case, it's likely there's an established evaluation criteria and format for presenting that information. Voila! your content and approach is defined. If you don't have a defined purpose, consider whether your objective is to inform, to educate, or to inspire a course of action. State that objective in a general sense, including what action you want your audience to take based on your presentation. Once you have that sketched in, consider your audience.

Audience

The second step in the presentation development process is audience research. Who are the members of your audience? Why are they attending this conference, meeting, or presentation? This step is similar to the demographic and psychographic research marketers conduct prior to crafting a product or service pitch—and is just as critical. Key factors to consider include your audience's age range, educational level, industry/role, subject matter knowledge, etc. These factors matter for two reasons: you need to know what they know and what they need to know.

Understanding your audience will allow you to articulate what may be the most critical aspect of your presentation: "WIIFM," or what's in it for them. Profiling your audience also allows you adapt your message so it's effective for this particular audience. That is, to present your idea (proposal, subject matter, recommendations) at a depth and in a manner (language, terminology, tools) that's appropriate. Don't expect your audience to meet you where you are; meet them where they are and then take them where you want to go together.

Returning to the site analysis example mentioned earlier, knowing your audience also means getting clear on what management expects from you. Are you serving in an analyst role—conducting research and presenting "just the facts"—to support a management decision? Or are you expected to make a specific recommendation? Be careful of power dynamics and don't overstep your role. Either way, be prepared to take a stand and defend your position. You never know when a routine stand-and-deliver could become a career-defining opportunity.

Message

The third step is honing your message. In "TED's Secret to Great Public Speaking," TED Conference curator Chris Anderson notes that there's "no single formula" for a compelling talk, but there is one common denominator: great speakers build an idea inside the minds of their audience. Take, for instance, Chimamanda Adichie's idea, which Anderson summarizes as "people are more than a single identity." (Note: Anderson, Chris. "TED's Secret to Great Public Speaking." *TED*, March 2016.) As Adichie expresses it: "The problem with stereotypes [of a single story or identity] is not that they are untrue, but that they are incomplete." (Note: Adichie, Chimamanda Ngozi. "The danger of a single story." *TED*, July 2009.) Or Sir Ken Robinson's idea that creativity is a essential building block for learning. As he expresses the idea: "My contention is that creativity now is as important in education as literacy, and we should treat it with the same status." (Note: Robinson, Ken. "Do schools kill creativity?" *TED*, Feb 2006.) Ideas matter because they're capable of changing our perceptions, our actions and our world. As Anderson puts it: "Ideas are the most powerful force shaping human culture." (Note: Anderson, *TED*)

So if ideas are that powerful, more is better, right? Perhaps a handful or a baker's dozen? Wrong. As any seasoned sales person knows, you don't walk into a meeting with a prospective client and launch into an overview of every item in your company's product or service line. That's what's known as "throwing spaghetti on the wall to see what sticks." And that's an approach that will have you wearing your spaghetti—and perhaps the dust from one of your client's shoes on your backside, as well. What audience members expect is that you've done your homework, that you know them and their pain, and that you have something to offer: a fresh perspective, an innovative approach or a key insight that will change things for the better. As Chris Anderson puts it: "pick one idea, and make it the through-line running through your entire talk." (Note: Anderson, *TED*) One message, brought vividly and relevantly to life.

So now that you have a macro view of the presentation development process, let's review what can what can—and often does—go wrong so we can avoid the common mistakes.

PRACTICE QUESTION

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Bad Presentations

For many, the prospect of developing and delivering a business presentation rates right up there with death and taxes. Interestingly, that same mixture of fear and loathing is often felt by audience members as well. But it doesn't have to be that way. The ability to craft a compelling story is a skill as old as the human race, and the need to communicate is as primal and potentially powerful.

For millions of years before the invention of modern technology, humans used the tools available to perpetuate traditions and culture and to document—and often rewrite—history. Do a few internet searches and immerse yourself in the Egyptian tombs; the caves of Chauvet; or El Castillo, the Temple of Kukulcan. What you're experiencing is a feat of both artistry and communication. Although we don't know the full significance of these early carvings and structures, there's no doubt that these early humans captured their world view in a way that is still deeply resonant. While the tools have changed, the communication challenges—and opportunity—remain the same: to communicate an engaging and inspiring point of view.

Figure 1. Akhenaten as a sphinx, and was originally found in the city of Amarna.

Regardless of whether you want to change the world, build your brand, or build a billion-dollar business, effective presentation skills are essential. To quote legendary investor, philanthropist and Berkshire Hathaway chairman and CEO Warren Buffet, "If you can't communicate and talk to other people and get across your ideas, you're giving up your potential." (Note: Gallo, Carmine. "How Warren Buffet and Joel Osteen Conquered Their Terrifying Fear of Public Speaking," *Forbes*. May 16, 2013.) As would be expected of a numbers person, Buffet has quantified his point in talks on student campuses and professional organizations. Speaking at his alma mater in 2009, Warren Buffett told Columbia Business School students that he believed learning effective communication skills could translate into 50 percent higher lifetime earnings.

Given our vibrant storytelling tradition and with so much at stake, why are there still so many bad presentations? Wouldn't you think that modern communication technology—considering the advances in graphics and communications software alone!—would lead to more compelling presentations? Interestingly, the problem is, to some extent, the technology. It's estimated that 30 million PowerPoint presentations are created every day, with (seemingly) a majority of presenters opting for default layouts and templates. The problem is, we're wired for story, not bullet points. A related failure is our use of available technology.

Seth Godin has a wonderful—and instructive—rant on these points: Really Bad PowerPoint (and how to avoid it), blaming Microsoft wizards, templates, built-in clip art and lazy presenters for ineffective presentations. In response to a question regarding "death by PowerPoint" on the TechTarget Network, Margaret Rouse provided this definition: "a phenomenon cause by the poor use of presentation software," identifying the primary contributors of this condition as "confusing graphics, slides with too much text and presenters whose idea of a good presentation is to read 40 slides out loud." (Note: Rouse, Margaret. "What is death by PowerPoint?" *TechTarget Network*.)

So how do we avoid causing "death by PowerPoint"—or by whatever presentation software we use? The common denominator of presentation mistakes is that they represent a failure of communication. This failure can be attributed to two errors: too much or too little. The error of too much is generally the result of trying to use slides as a teleprompter or a substitute to a report, or, it would seem, to bludgeon the audience into submission. Of course, this tends to have an alternate effect, namely, prompting audience members to walk out or tune out, turning their attention instead to doodling or their device of choice.

What bad presentations have too little of is emotion. Presentation expert and author of the classic Presentation Zen (and 4 related books) Gar Reynolds captures the crux of the problem: "a good presentation is a mix of logic, data, emotion, and inspiration. We are usually OK with the logic and data part, but fail on the emotional and inspirational end." (Note: Reynolds, Garr. "10 tips for Improving Your Presentations Today," Presentation Zen. Nov 2014.) There's also a hybrid too little-too much mistake, where too little substance and/or no design sensibility is — in the mind of the presenter — offset by transitions and special effects. Heed Seth Godin's advice: "No dissolves, spins or other transitions. None." (Note: Godin, Seth. *Fix Your Really Bad PowerPoint*. Ebook, sethgodin.com, 2001.)

The 10/20/30 rule, generally attributed to venture capitalist Guy Kawasaki, is a good guideline to help you achieve a "just right" balance in your presentations. Geared for entrepreneurs pitching their business, his advice is a discipline that would improve the quality—and, effectiveness—of most presentations. In brief, 10/20/30 translates to a maximum of 10 slides, a maximum of 20 minutes and a minimum of 30 point font. (Note: Kawasaki, Guy. *The 10/20/30 Rule of PowerPoint*. December 2005.)

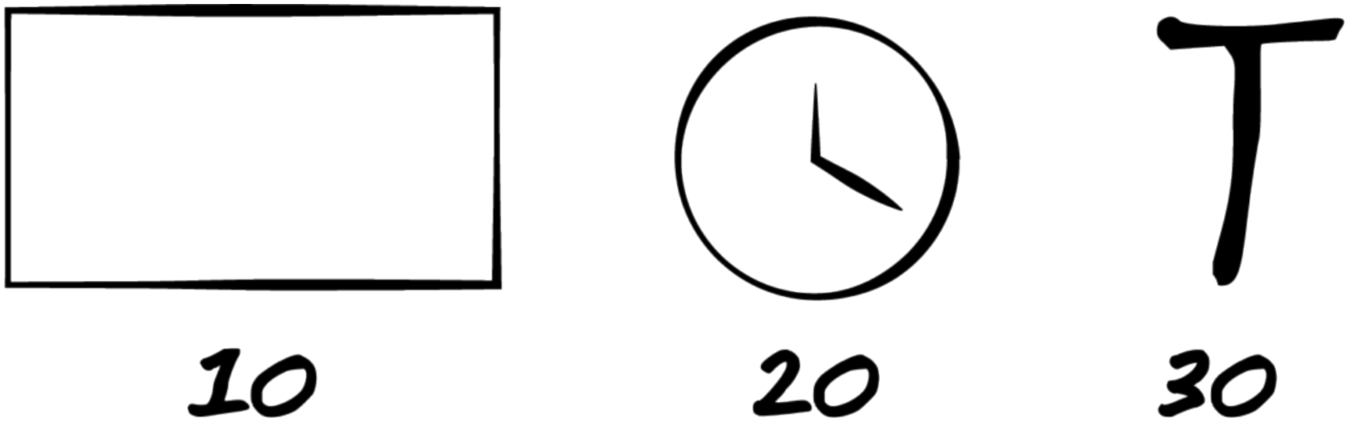

Figure 2. Your presentation should have no more than 10 slides, take no more than 20 minutes, and use type no smaller than 30 point font.

While this rule is a good starting point, it doesn't overrule your audience analysis or understanding of your purpose. Sometimes, you may need more slides or have a more involved purpose—like training people in new software or presenting the results of a research study—that takes more than 30 minutes to address. In that case, go with what your audience needs and what will make your presentation most effective. The concept behind the 10/20/30 rule—to make new learning easy for your audience to take in, process and remember—should still be your guide even if you don't follow the rule exactly.

HOW TO AVOID DEATH BY POWERPOINT

For more on how to avoid causing death by PowerPoint, watch Swedish presentation expert and How to Avoid Death By PowerPoint author David Phillips TED Talk on the topic:

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PRACTICE QUESTION

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Making a Presentation for a Meeting

With perspective on the technical tools, communications planning and information design, let's take this learning for a test drive.

What's considered an effective (that is, persuasive) presentation structure hasn't changed fundamentally over the centuries. In his analysis of dramatic structure in the *Poetics*, Aristotle identified a play as having three parts: a beginning, middle and end. The story begins with a "complication" (problem), ends with an "unraveling" (resolution), and follows a logical sequence of events from beginning to end. Hollywood screenwriters use the same structure and dynamics. Screenwriter, producer and author Syd Field, whom CNN called "the guru of all screen writers," translated this simple three-step structure into numerous books and workbooks, including the bestsellers *Screenplay: The Foundations of Screenwriting* and *The Screenwriter's Workbook*.

In a business context, a good presentation is an effective presentation. That is, a good presentation achieves its intended outcome. Clearly, in order to achieve a specific outcome or objective, you need to know what it is. So, prior to crafting the drama (in word or slide), you need to hone in on three things:

- The purpose of your presentation
- Your audience
- Your (one) message

For a review of these elements, refer to What's my Presentation About.

Once you're clear on those points, let's proceed.

To build our presentation, we'll use presentation expert Nancy Duarte's interpretation of the classic 3-part story structure illustrated in Figure 1. For additional perspective on this structure, watch her TED Talk, "The Secret Structure of Great Talks," or read her Harvard Business Review article, "Structure Your Presentation Like a Story."

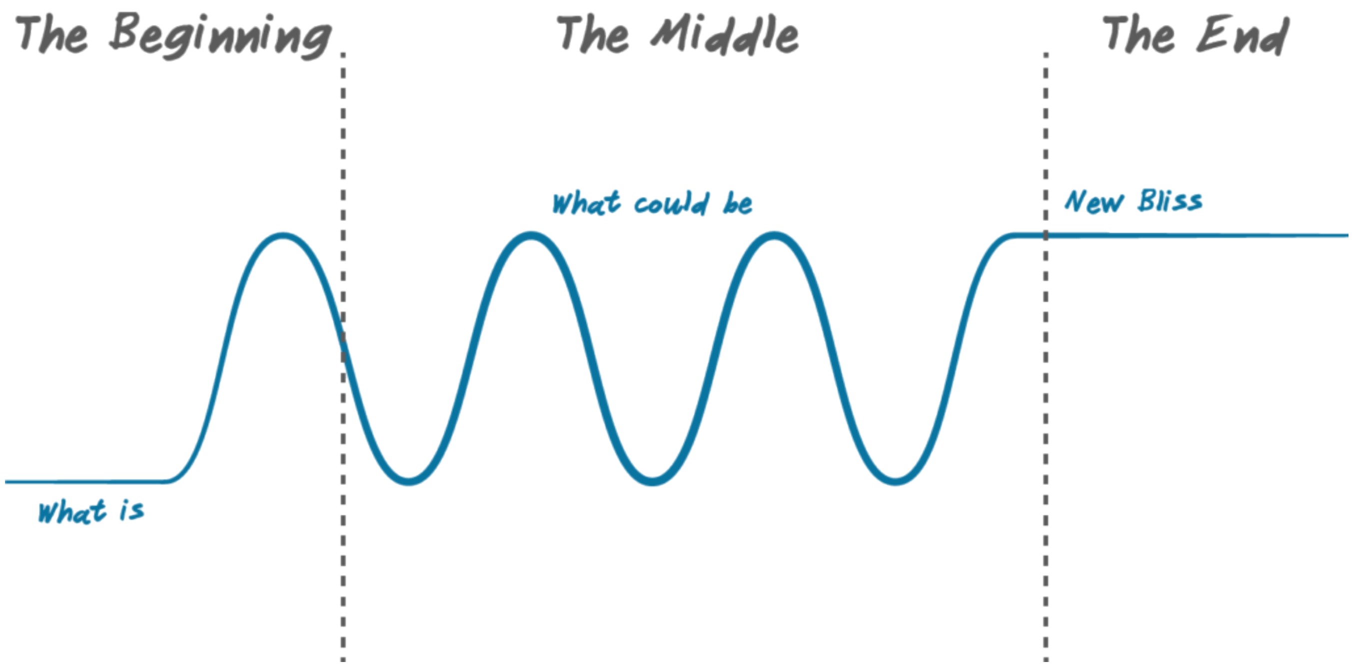

Figure 1. Persuasive story structure (Duarte, "Structure Your Presentation Like a Story," 2012).

The Beginning

The story starts with "What is"—the current state. Describe this baseline state in a way that is recognizable to the audience. This allows you and the audience to get in sync. And with this base level of agreement, your audience will be more receptive to your proposed change.

The second step is to introduce "What could be." The gap between what is and what could be adds tension and drama to your story and largely determines the significance of your presentation. If there's no conflict, no proposed change, what's the point of the presentation?

Let's say you're an analyst on the new product development team of a retailer known for exclusive, trend-forward "house" branded products. Your company's reputation and revenue depends on consistent introduction of new consumer-product goods. Marketing and distribution are key strengths, but new-product performance is off, revenue is below expectations and the company's stock price recently fell 30 percent. Within your company, R&D (research & development) is strictly an insider's game; any ideas or innovations that weren't developed in-house are blocked. The problem is, you can't innovate fast enough—or with enough market demand accuracy—to meet financial and stock market expectations. You and the other analysts on your team have been tracking innovation trends and successes and you think the answer is opening the R&D works to outside ideas and innovations. Here's how you might lay out your presentation:

- What Is: We missed our quarterly earnings numbers, largely due to a failure to meet our innovation success targets over the last six months.
- What Could Be: Initial data suggests we could get back on track by modifying our R&D model to incorporate external innovations.

The Middle

The bulk of your the presentation is developing the contrast between what is and what could be in order to set up your proposed resolution of the conflict or challenge. The objective is also to establish the validity of your arguments, so your proposed call to action is perceived as a logical, ideally inevitable, conclusion of the conflict.

- What Is: We currently bear the full cost and risk of developing new products and our innovation success rate—the percentage of new products that meet financial objectives—is running 25 percent below target.

- **What Could Be:** Sourcing promising innovations from outside the company could reduce R&D costs and risk while also increasing our innovation success rate.
- **What Is:** Our R&D process is taking so long that we're missing trends and losing our market-leading brand reputation.
- **What Could Be:** We could license or buy promising innovations for a fraction of the cost it would take to develop them from scratch and leverage our marketing and distribution strengths to claim shelf and market share.
- **What Is:** Our below-plan performance and new product pipeline is costing us political capital with executive management, and we're at risk of losing budget and/or layoffs.
- **What Could Be:** Adopting an open innovation culture would allow us to create partnerships that leverage our strengths and drive revenue, regaining a position of value within the company.

The End

To craft a powerful close, heed Duarte's advice and avoid a list of bullet point to-dos. Your objective here is to achieve resolution of the conflict introduced at the beginning, to issue a call to action that inspires your audience to support your vision of what could be, a state Duarte refers to as the "new bliss."

Call to Action

To recover our position of a source of revenue and brand value, we need to start working to build a culture and networks that support open innovation and accelerate the development of new products, regardless of the source of the idea.

New Bliss

Our ability to drive value secures our position and reputations in the company, and in the marketplace, and pays off in employee stock value and profit sharing.

The new bliss articulates the proposed—and a desired future state—incorporating the WIIFM, what's in it for me, that motivates your audience to buy into and work to support the required change.

PRACTICE QUESTION

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PUTTING IT TOGETHER: DEVELOPING AND DELIVERING BUSINESS PRESENTATIONS

Let's return to your presentation for SB '18 and assume you were able to power through your doubts and accept the call. Now that you have a solid understanding of presentation tools, options and techniques, let's put it all together.

Creating a good presentation involves research and analysis, reflection and distillation. As is true of many things in life, the process will go more smoothly if you start with the end in mind. Prior to putting words on paper/slides, address the three presentation planning priorities: purpose, audience and message. These three priorities will determine (or at least inform) your content, presentation tools, and techniques. Note: Message—the idea you want to communicate—is singular, not plural. Think simple, clear and compelling.

In addition to keeping your end (your desired outcome or audience action) in mind, you need to consider your audience's desired outcome. As Theodore Roosevelt noted: "Nobody cares how much you know, until they know how much you care." And speaking of care, do your audience a favor and invest at least as much time in the design of your slides as the selection of your words. Remember that communication in whatever format is a fundamentally human interaction; invest your presentation with your personality: your passion, your point of view and your sense of humor (if you have one).

Figure 1. We are all storytellers

Finally, before going live, test drive your presentation. Ask colleagues, friends or family to listen to a dry run and rate you on the presentation evaluation criteria. In particular, identify and address any words or images that may represent a barrier to effective communication.

Let go of the memories of bad presentations—and reject the default choices and templates that contribute to ugly slides and ineffective presentations. Think of the many stories that have engaged you and that you have told over the years and channel that energy when you get up to speak.

THE ART OF STORYTELLING

If you're interested in learning more on about cultivating your innate storytelling skills, you can check out Pixar's The Art of Storytelling on Kahn Academy.

MODULE 9: COMMUNICATING THROUGH TECHNOLOGY

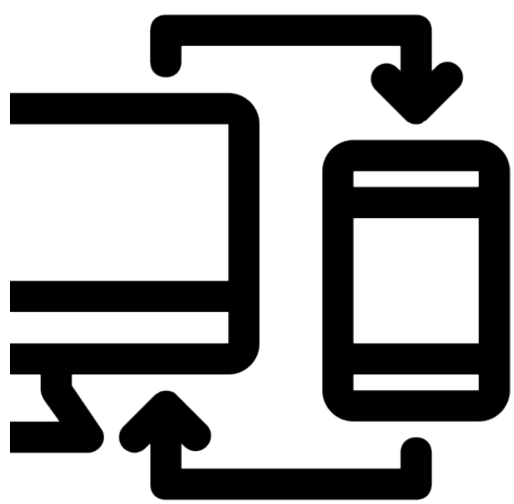
WHY IT MATTERS: COMMUNICATING THROUGH TECHNOLOGY

Why learn to participate in meetings using phone and video conferencing tools?

Both personal and professional communications are becoming increasingly dependent on technology. Everything from ordering dinner from your favorite Thai place to showing samples to far-away colleagues to running a credit card transaction depends on internet and phone communication.

As with in-person communication, there are rules of etiquette for voice, video, and screen-sharing interactions. Some are specific to the technology you are using, but for the most part, there's a simple set of guidelines that should see you through any interaction involving technology.

Technology can also generate strong emotion in people: fear, frustration, fascination. In this module, you will learn how to calm the emotion and refocus people on the work at hand.



There are, of course, also considerations about the technology itself: Which platform or application do you choose? How do you use it? How do you make sure the conversation goes smoothly and productively for all involved?

Throughout this module, we will assume that you are the host or originator of the communication, though we will talk about how to be an effective participant when someone else is hosting.

COMMUNICATION TOOLS

What you'll learn to do: Recognize common types of tools for audio, video, and web sharing tools

The set of specific sites, applications, and platforms for communication grows almost daily, and each service offers its own combination of features, attributes, and benefits at a wide range of price points. The basic types we will discuss in this module include the following:

- Regular landline phones and cell phones with two or more people on the call.
- VOIP phone systems through hardwired phones, cell phones, and computers.
- Videoconferencing sites.
- Web sharing sites.
- Multi-feature online communication platforms such as Google Hangouts, Slack, and Amazon Chime.

The following modules will discuss these applications assuming you get to choose which ones you use. However, it's worth asking your boss whether your company already has preferred platforms for communicating through technology. Your organization might have paid subscriptions that allow you access to special features or increased levels of security. If you work for a very large corporation, some of those features may even have been customized just for its workforce. If that's the case, this module will still be helpful for you in understanding how to choose a communication channel and what the best practices are for using it.

LEARNING OUTCOMES

- Compare and contrast common tools for audio communication
- Compare and contrast common tools for video communication
- Compare and contrast common tools for screen / web sharing
- Explore multifeature online platforms / virtual office spaces
- Recognize the strengths and weaknesses of various tool categories

Audio Communication

You may be asking yourself why we're taking the time to learn how to have a phone call, but this is more nuanced than you may think. The factors to consider in deciding what method to use for an audio-only conversation can be thought of in terms of Three Cs:

- Clarity of the line
- Cost, especially if you are calling internationally
- Comfort in the security of the call, especially if information is sensitive

For most day-to-day calls, the phone on your desk or the cell phone in your pocket will work just fine. However, there are some things you should know—positive and negative—about both of those tools, and all the others available to you, in order to make good decisions about which to use.

Cell Phones and Smartphones

As we all know from the frustrations of losing a call in an elevator or discovering a dead battery just when we need our best friend the most, cell phones are great . . . except when they're not. For business calls, cell phones are generally not preferred under normal conditions for reasons that have to do both with the technology and with the human behavior around it.

- Calls can get dropped or one party can "lose" the other for a few seconds.
- Lines can be noisy, especially if there's electronic interference.
- Phones are not always fully charged when we need them to be.
- Calls between two or more cell phones—especially in speaker mode—can involve unwanted sound artifacts like echoes and static.
- Since smartphones also receive texts, emails, and other notifications, chimes, whistles, and the opening bars to "Stairway to Heaven" can suddenly sound in the middle of important conversations.
- The whole point of a "mobile" phone is that people can move around.
    - They may leave their desks and start multitasking during your call.
    - Some take important calls—even when they're scheduled in advance—out in public where there's noise, lots of distraction, and not much privacy.

While these negative aspects of cell phone technology mean it's not always a great first choice, having a cell phone available can help in all kinds of unexpected situations.

- The landline phone system goes out.
- The internet goes out, meaning that your videoconference or VOIP call can't happen.
- An important participant can't manage more sophisticated technology.
- A participant is on the road and either must join the call on their cell or can't join at all.

Voice Over Internet Protocol (VOIP)

A VOIP call is, at its most basic, a call in which the audio you create by talking gets converted to a digital data package, zipped over the internet, and then reassembled to come out of the speaker of the person you're talking to—all in a nanosecond or two.

VOIP calls can be made on a bunch of different devices. Most newer "landline" phone systems are actually VOIP systems, even when the phone itself looks pretty standard. The decision to install a VOIP phone system in your workplace is probably made at the highest levels, so we won't spend time on the advantages and disadvantages of large business systems like that.

Where you can make a choice about using VOIP is through your computer or your cell phone. Why would you go through your computer rather than using a landline (a real one, not a VOIP that looks like one) or your cell?

- No matter where you are in the world, your calls all come from the same number. This is great if you travel a lot internationally or work from home since no one needs to know you're away from your desk unless you choose to tell them, and they can reach you without having to keep track of multiple numbers.
- International calling is less expensive.
- There are lots of useful features such as being able to transfer a call from your VOIP line to your cell or laptop, easy conferencing, and call recording. Features depend on the VOIP system your company installs or the VOIP platform you find online.

Two disadvantages of VOIP systems are really the same disadvantages of any internet-based platform:

- VOIP requires a lot of bandwidth and a high-speed internet connection. Most services state clearly on their websites what the minimum connection parameters are for VOIP calls. Check with your IT department or your internet service provider to find out what bandwidth and speed you have.
- If your internet service goes out, your phone service does, too.
- While most major VOIP providers are heavily invested in the security of their systems, anything online can be hacked, so think about the level of security your business requires.

Some examples of VOIP brands are Vonage, Ring Central, and Grasshopper.

Conference Phones

A conference phone is simply a phone equipped with conferencing capabilities. This means three or more people can take part in the same conversation at once. The phone on your desk at work almost certainly has a conference feature. If you have a conference room, there may be a conference phone speaker in the middle of the table. This is designed to pick up the voice of whoever is speaking around the table.

A conference phone can be a regular landline or a VOIP line. There's a conferencing feature on your smartphone that's pretty easy to use, too.

The number of people you can have on a call, as well as the ease of making a call and the quality of the call will depend on the system you have. For example, an iPhone allows a call among up to five people while most VOIP systems allow you to include hundreds of people.

Figure 1. A Conference Call Phone

Conferencing Services

Another way to get a lot of people on a call is to use a conferencing service such as freeconference.com, gotomeeting.com, or join.me. These third-party systems work by assigning you a number and a login code. You can then invite your participants by sending them this information via email or by using the invitation functions many of these services have built in.

When the time comes for the call, people dial in using the number and login. The call begins when the host joins the call, at which point, everyone can participate.

For the most part, these calls are not all that different from any other type of conference call. However, there are a few things to note:

- The free versions of these services may not have all the features available and/or they may limit the number of calls you can schedule per month.
- Paid upgrades give you access to more features and more calls per month.
- With most systems, there is a chime or electronic sound when someone joins or leaves the call.
  - This can be great if you want to keep track of who has heard which parts of the call.
  - It can also get annoying on calls involving lots of people or long, multipart calls where people can hang up once they've heard the pieces that are relevant to them.

Google Voice

Google Voice is a function you can access through your Google login. You can use it to consolidate all your calls (home, work, cell) under one number, and it offers features like converting your voicemails to text.

Google Voice is available only within the US, though it is a good way to make inexpensive international calls from the US.

Google Voice is separate from Google Hangouts, which we will discuss in a bit.

PRACTICE QUESTION

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Video Communication

The tools and platforms available to you for video communication generally work in more or less the same ways, through the details of features and benefits will vary somewhat.

To conduct a call or meeting by video, first you must make sure you have the necessary equipment.

- A camera.
  - Most newer computers (post-2010) have cameras built in. On laptops, the camera is usually in the center at the top of the screen.
  - You can also purchase a separate webcam. Webcams vary widely in price, from about $20 to a couple hundred dollars. For video conferencing under normal indoor lighting conditions, a camera from the middle of the pack will do. There are lots of online reviews of webcams to help you make a choice.
- Audio input and output. You should make sure the computer you plan to use has a working speaker, so you can hear others, and a working microphone, so others can hear you.

Videoconferencing is generally accomplished using a third-party application such as Skype, Zoom, WebEx or video features in a multi-featured platform like Slack or Amazon Chime.

Each offers slightly different features or different ways of accessing common features. That said, when you are choosing a platform, consider the following parameters:

Figure 2. Example of an ooVoo call.

- Is this a presentation mostly led by one person or a collaborative meeting? If attention is going to be on mostly one person, consider how the video windows are arranged. Figure 2 shows a collaborative meeting with all of the participants' images the same size. Figure 3 shows a meeting in which the dark haired woman is leading and therefore has the largest picture.
- Will the video be used only to see each other's faces or to show products, samples, or demos? If you're just looking at faces, most platforms will work just fine. If you are showing or demonstrating products, you may want to seek out the platform with the highest resolution image so that participants can follow without any pixelation or loss of sharpness.
- Does the audio sync well with the image? Some older platforms can have issues with the image getting ahead of the sound. This is distracting to watch and can lead to people unintentionally interrupting or talking over each other.
- Does it work well on tablets and smartphones as well as on computers? Can participants switch among devices if needed?

Figure 3. Video conferencing with a lead.

PRACTICE QUESTION

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Screen Sharing / Web Sharing

Sometimes the most important aspect of your meeting or conversation will be the ability to see someone's computer screen. You may deliver a presentation this way, share sales figures, play a video, or mark up design prototypes. In these instances, screen sharing is your best friend.

Several of the platforms already mentioned—WebEx, Join.Me, Slack, Google Hangouts—as well as others like GoToMeeting and Highfive offer screen sharing options.

When choosing a screen sharing platform, there are a few things to consider:

- What is the main reason for my screen sharing?
  - If you are simply showing PowerPoint slides or going over a spreadsheet, most platforms work equally well.
  - If you intend to allow participants to mark up what you are showing or copy and paste into a shared file, you will need to make sure your platform does that. Google Hangouts and Amazon Chime are two platforms that offer these features.
- Will more than one person share their screen? Most platforms allow you to switch among the call participants' screens, but some make this easier than others.

PRACTICE QUESTION

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Multi-Feature Online Platforms

So far, we've been seeing names like Slack, Google Hangouts, and Amazon Chime pop up in several categories. That's because these platforms offer a variety of features in order to create a complete virtual office environment.

In addition to communication features like voice, video, and screen sharing, these applications also facilitate scheduling, instant messaging, file sharing, and collaboration. They are also continually adding and upgrading features.

Chances are, if your company or team uses a tool like this, you will have been using it since day one to communicate with your immediate coworkers. Exploring the additional tools available is a worthwhile use of your time, especially if you are primarily using technology to communicate with people who are already part of your team.

Here are a few important benefits of using one platform for all your technological communications:

- You can search the whole environment for a specific item. For example, in Google Hangouts, if you don't remember whether you talked with Beth about Easter promotions via email or instant message (IM), you can simply search on "beth easter," and get results from all message channels.
- Recording is easy. If you are editing a display design as a group, and you want to keep track of how and why you made specific decisions, you can do so, usually with one click. Recordings are then sharable.
- Sticking with one platform for all internal/team communication and collaboration means that you and your colleagues need to learn only one piece of software and one set of commands.

If you want more information about these platforms as a whole—not just the voice, video, and screen sharing aspects—there are a lot of good videos on YouTube that go to varying levels of depth on specific features. Just be sure you watch fairly recent ones since these platforms are constantly in upgrade mode.

PRACTICE QUESTION

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Comparing Communication Tools

These choices can seem overwhelming, especially if you're not a technology nerd. In order to get past the panic and make some good decisions, the first thing to do is ask yourself some questions about what you want to achieve in a particular communication situation. Consider three general topics:

- What's the purpose of the communication? What business goal do I need to achieve?
- Who is my audience / cohort for this communication?
    - How many people need to be involved?
    - How do they function as a group?
    - How comfortable are they with technology?

        ◦ What technology do we already share?
- What do I need to show or talk through?
    - If this were an in-person meeting, would I want a white board? A flipchart? A projector?
    - Do I have samples to show?
    - Do I need to demonstrate a product or process?

Since technology can be tricky—especially if you and your team are using a particular platform for the first time—a good general rule is to ask, "What's the simplest technology I can use and still achieve my goals?"

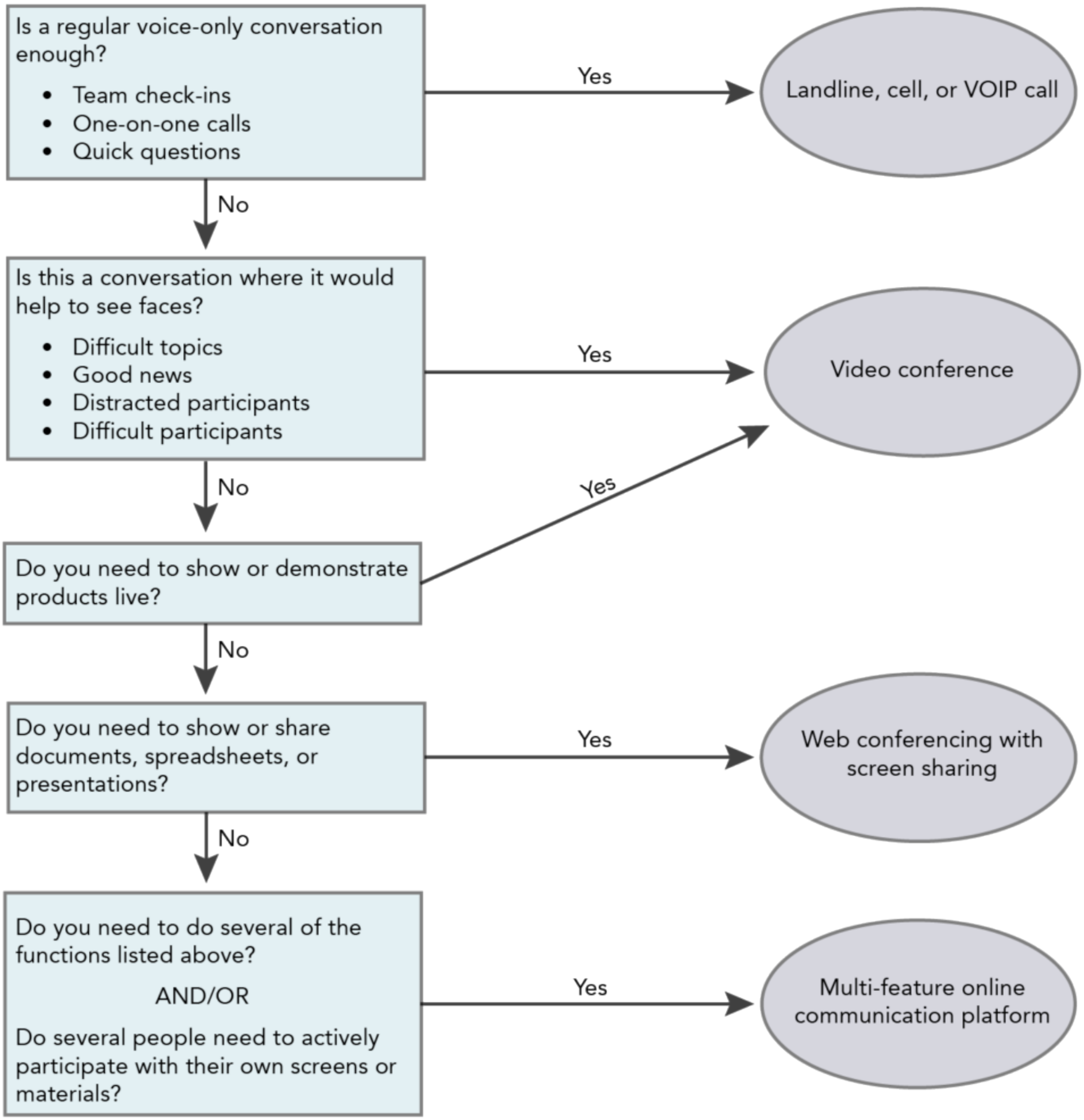

Figure 4. Click for a larger version of this image.

We will talk in more detail about each of these issues in the sections to follow.

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SCHEDULING A MEETING

What you'll learn to do: Use common planning tools to schedule business meetings

Obviously, before you conduct a meeting, you need to plan and schedule it. Often, getting everyone in the same space—physical, mental, or cyber—is the most challenging aspect of having a meeting. Luckily, there are sites and software that can make planning and scheduling a lot easier.

For planning, there are polling tools, such as SurveyMonkey. For scheduling, there are two kinds of tools:

- Scheduling sites, such as Doodle and Calendly.
- The scheduling tools on your company's calendar software, such as Outlook, Google Calendar, or Mac Calendar. We'll talk about these in a bit.

LEARNING OUTCOMES

- Discuss when and how to use polling tools
- Discuss when and how to use scheduling tools
- Identify the best time for a meeting using Doodle or Calendly

Polling Tools

In a meeting that has lots of people in various locations and several agenda items to accomplish, it can be a little scary to make sure you have all the details nailed down. Sending an email saying "what do you need?" not only can yield answers from "a flip-chart and markers" to "six webcams and a tap dancing iguana," it's also hard for you as the meeting planner to keep track of all the moving parts: schedule, topics, equipment, menu, location.

Conducting an online poll among your team members lets you collect all the information in one place and it gives you control over limiting the options. For example, if you are asking about equipment and supplies, you can choose to list only those items that are reasonable and easy to find. If you're asking whether a meeting requires video chat, you can ask where people will be joining from. “Switzerland,” “the factory in Omaha” or “home with a broken ankle” are valid reasons for video chat. “Simultaneously watching *Game of Thrones* on my iPad” is not.

But you can also use polling to get an anonymous take on more serious issues around meetings.

EXAMPLE

Let’s look at a hypothetical situation in which polling tools might be useful not just in deciding whether you serve pizza or burritos at the meeting but also in handling a challenging agenda item:

Shawn is a regional manager for a clothing retailer. He wants to have a meeting to share the results of some shop-alongs conducted in eight stores in his region by a qualitative researcher and a set of loyal customers. Most of the news is good, but there are a few issues to fix. Some of these issues are systemic and will require input from all his store managers. Others are limited to two specific stores and are concerning because they show those stores are not meeting basic customer service standards.

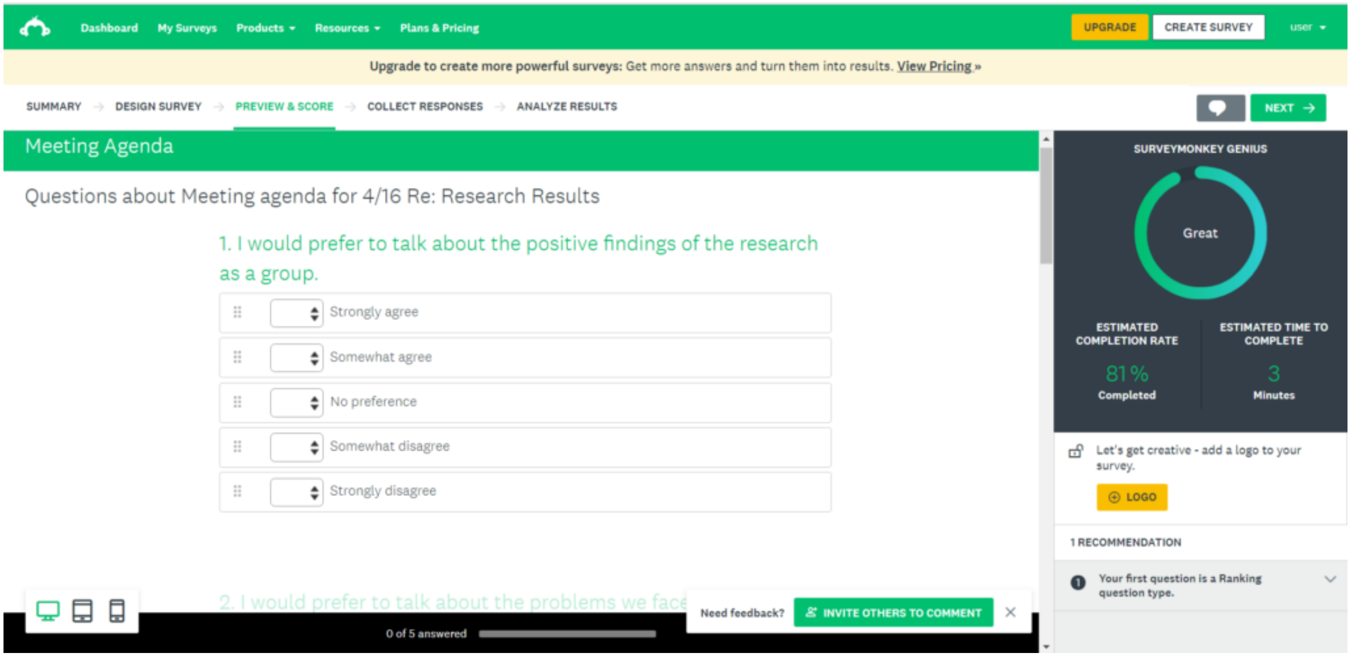
Shawn decides to send his own summary of the report to the store managers prior to a conference call, specifying the problems but not which stores have them, and asking managers to brainstorm on solutions in advance. Then he starts to plan his meeting agenda. He can envision this meeting playing out in a few different ways, and he can’t quite make up his mind how to proceed.

- Does he focus only on the positives and the systemic issues in this meeting and save the store-specific problems for one-on-one calls?
- Does he talk about the store-specific issues as a group, allowing the other managers to offer suggestions and support to the managers of the struggling stores?

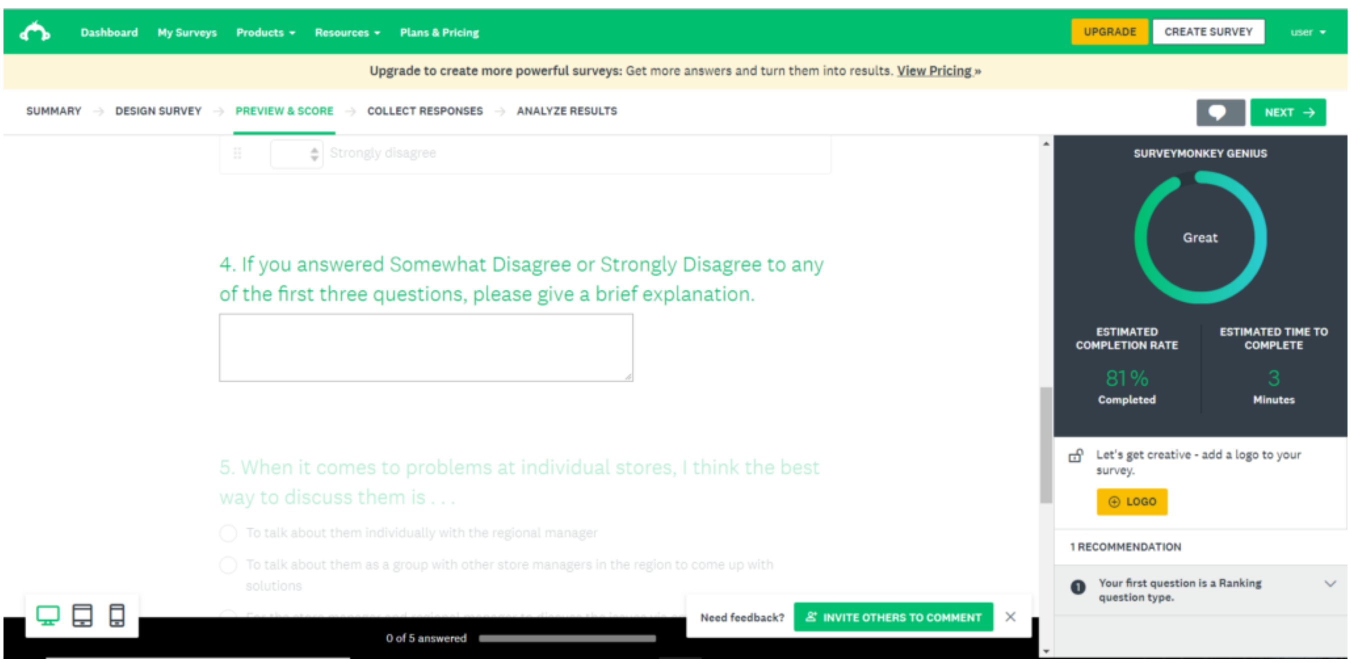
Since all the managers have his summary, he decides to give them a say in how the meeting is run. He creates an account in SurveyMonkey, and he goes through the steps of making a survey.

The basic rules of survey creation are pretty simple at this level, and the software makes it easy.

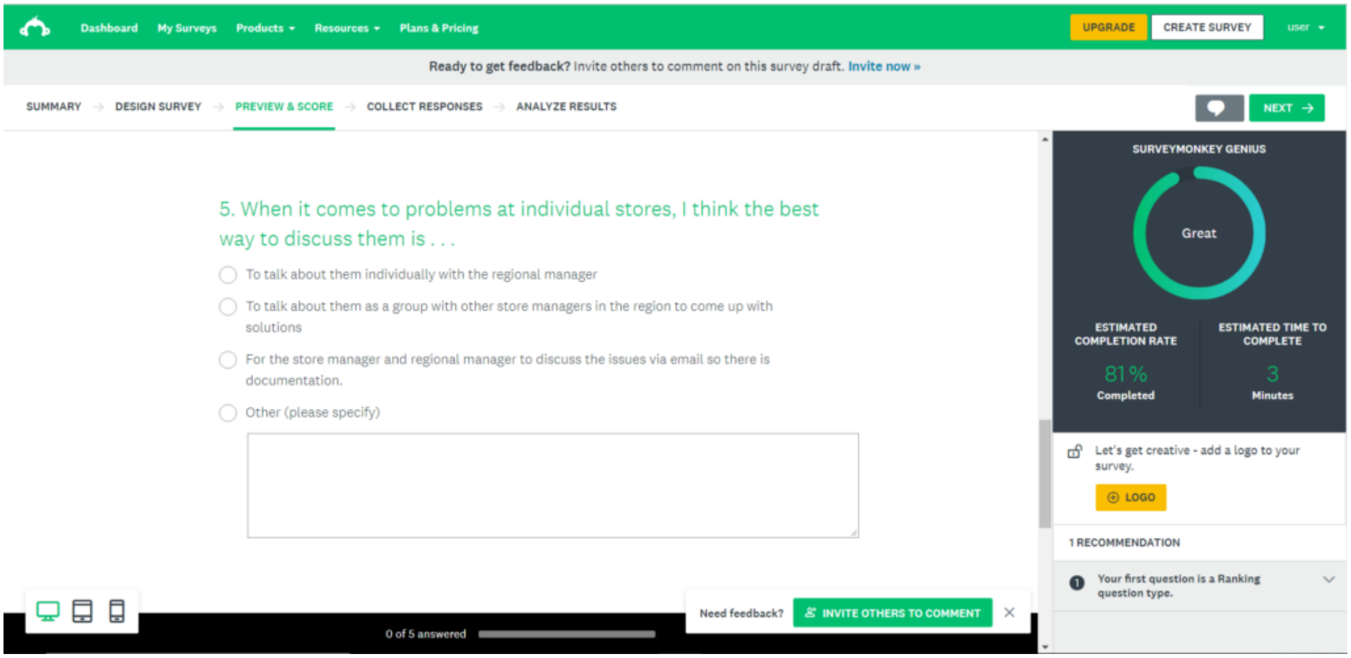
- Ask as few questions as possible while still getting the needed information.
- Ask only questions that related to the issue at hand. Don’t ask questions just because you’re curious or want to provoke your respondents.
- Phrase questions in a way that gives a full range of options and doesn’t “beg the question.” That is, don’t ask a question like, “How much do you hate plaid pants?” and then give a ranking from “More than a root canal” to “About the same as a hangnail.” The plaid pants-lovers of the world will not be pleased.
- Think about the best question type for what you need to learn. In the scenario above, Shawn decided he really wanted to know how intensely his store managers felt about the agenda issues, so he chose a Ranking question to help them express it. He asked this same kind of question about “problems we face as a region” and “issues at individual stores.”



- He also wanted to give people an opportunity to express their feelings in their own words, especially if they didn't want to talk about a topic, so he created a Comment question.



- Finally, he figured he would directly ask how bad news should be discussed. He had some ideas of his own, but he also wanted to be open to approaches he hadn't thought of. For this, he used a Multiple Choice question type with a final Other option with a text box.



As you can see, a well-constructed poll or survey can really help a meeting host or leader plan for everything from snacks to serious issues.

PRACTICE QUESTION

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Scheduling Tools

Scheduling meetings can also be a real challenge, especially if you have people in different time zones, people who are traveling, and/or people who work different shifts. Also, if you conduct large meetings or presentations, trying to keep track of everyone's availability using pencil and paper—or worse, trying to corral people via email—can get really frustrating.

Online scheduling tools such as Doodle and Calendly allow you to make scheduling a lot easier by gathering all the information in one place and letting people enter their availability for the time slots offered. Here's how they work, in brief:

- The meeting host or leader (let's say that's you) sets up a scheduling poll. It's even easier than a SurveyMonkey poll because it's only about scheduling. You select the possible time slots based on when you are available.
- Participants receive an email with a link to the question regarding the meeting schedule.
- They then choose all the times that work for them from the ones you have offered.
- You can schedule how often you receive updates on the poll, and you can log in to check on it at any time.
- Once all the participants have responded, you receive an email with a summary of their responses.
- You then choose the best time for the meeting based on their answers.
- You can have the software send meeting invitations with the time you chose and any other relevant text.
- Depending on individual settings, the software can populate each person's calendar with the meeting information.

These applications will also let you schedule a bunch of one-on-one meetings, like performance reviews, for example. We'll talk about that, too, in the next section.

PRACTICE QUESTION

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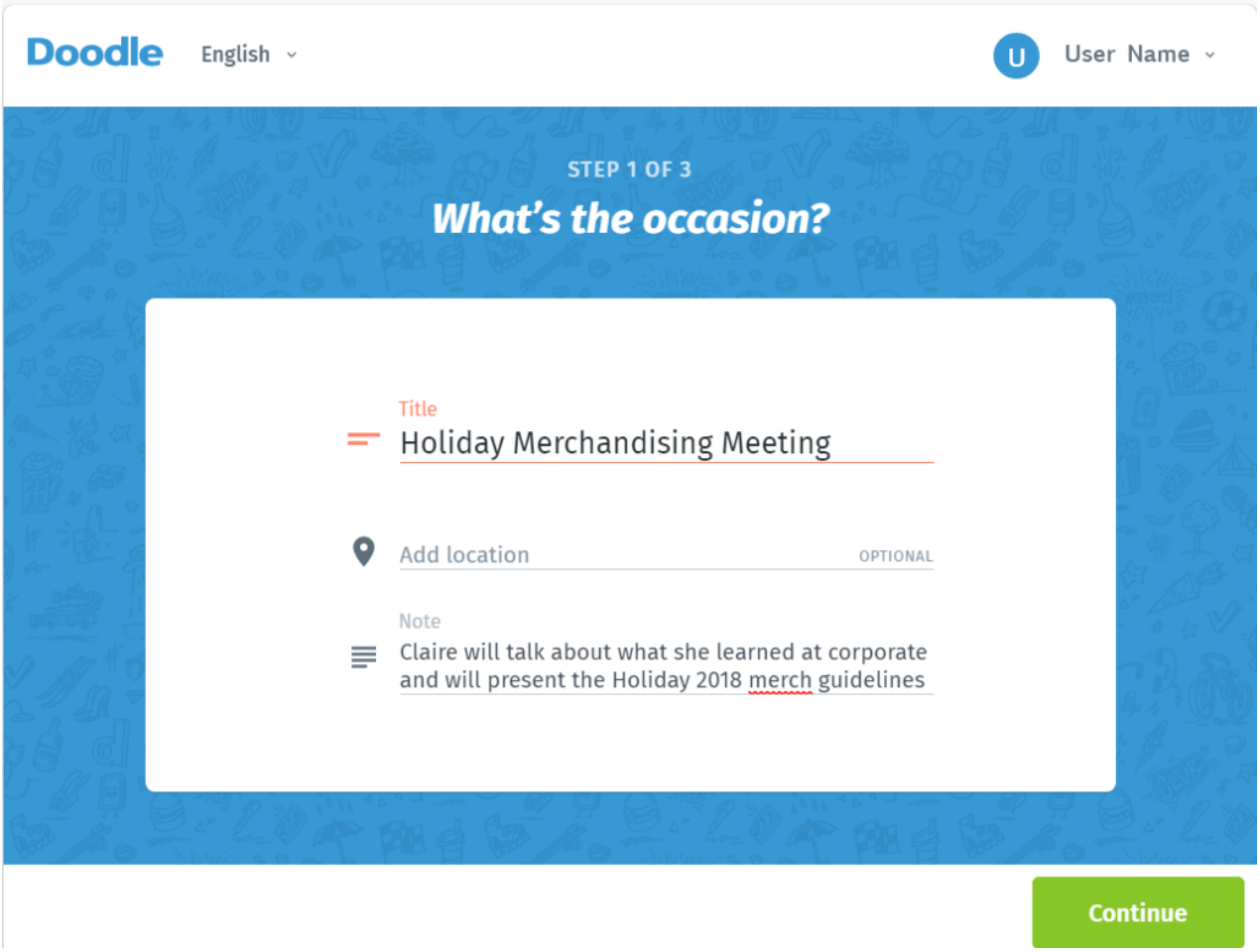
Using Polling and Scheduling Tools

Doodle (doodle.com) is a free scheduling service you can use simply by creating a login. Doodle also allows you to ask your colleagues basic questions in poll form. It's not as flexible as SurveyMonkey for multiple or complex questions, but it can handle "pizza or tacos" like a champ.

Scheduling

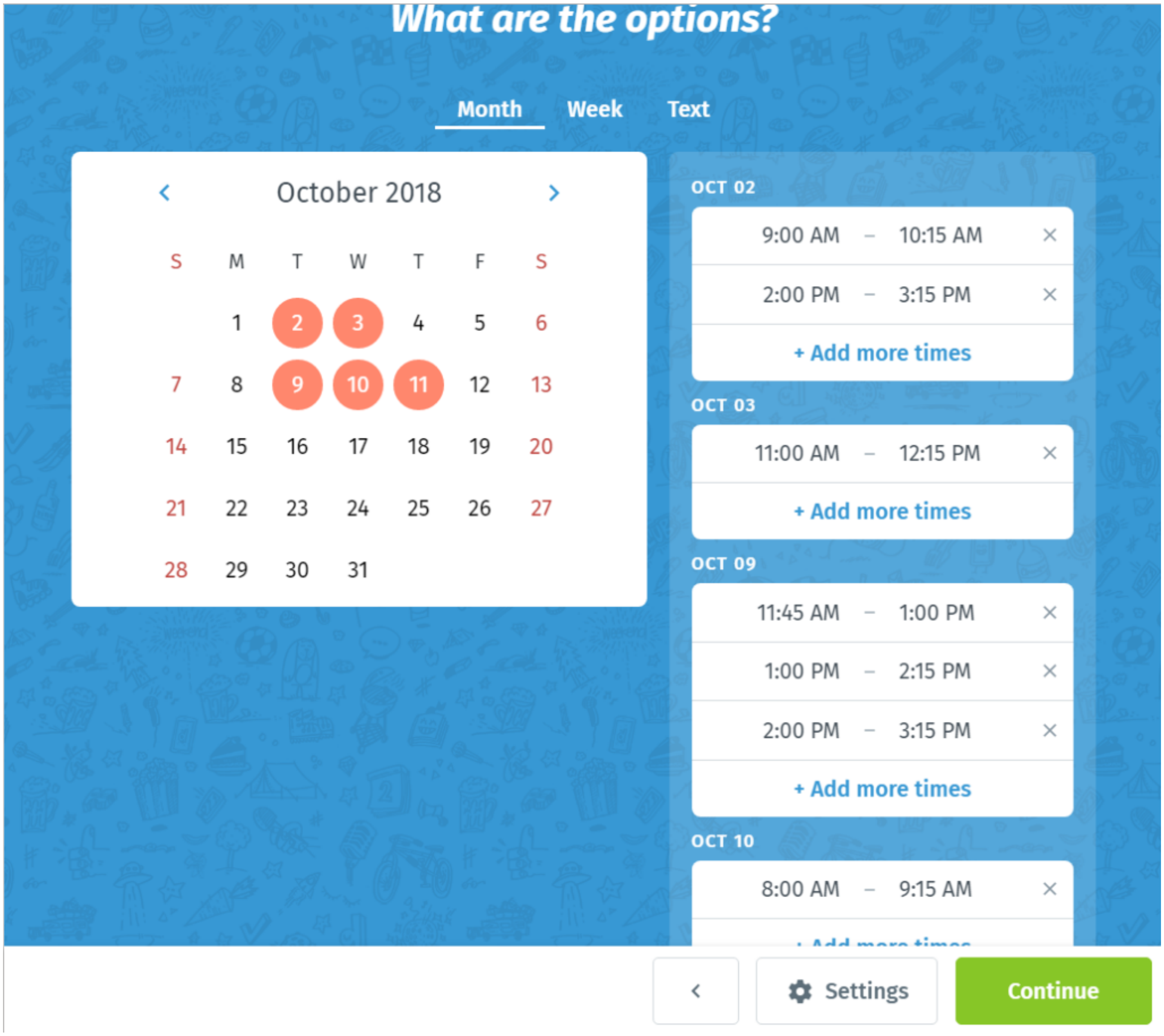
To create a scheduling question on Doodle for a meeting you are hosting or are responsible for scheduling, here are the steps to follow:

- First, decide how long you want the meeting to take. We'll talk later in this module about how to figure out timing when you are meeting using audio, video, or screen sharing technology.
- Then make note of when the most important person at the meeting is available. Let's call that person the Meeting VIP. That might be you or it might be whoever is presenting, leading, or most senior.
- Now it's time to log into Doodle.
- From the dashboard on the home page, select "Schedule an Event."
- You will then be asked to name the event, and you will have the option to add a location and a comment/note.
    - Name the event something that will be clear to those receiving the invitation.
        - "Tuesday Meeting," "Bill's Presentation," or "Conference Call Follow-Up" might not be specific enough.
        - "Q2 Sales Recap," "Weekly Planning Meeting," or "Bill's Presentation on Conference Highlights" are examples of more specific names that will help avoid confusion.
    - Add a location only if you are certain where it will be. If you're not sure yet whether a meeting will be virtual or in-person—or if it might be in the manager's office or the conference room depending on attendance—don't include a location. People remember what they read first, and you don't want cranky colleagues sitting in the break room while everyone else is at the coffee shop next door.
    - Notes can be helpful, especially if there are multiple meetings about the same topic, such as holiday planning or inventory.

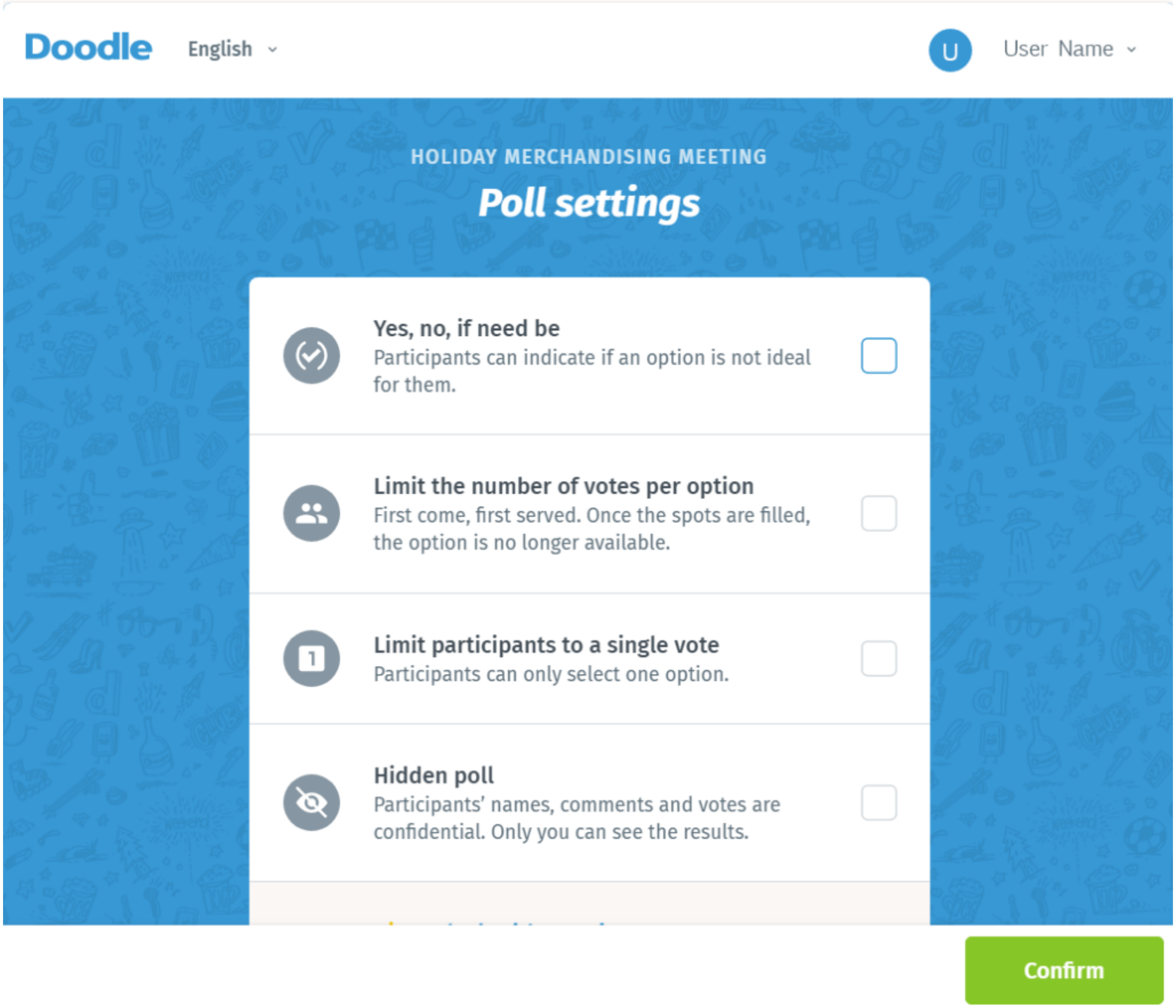


- Next, you'll see a calendar page that allows you to choose possible dates for the meeting. As you can see from the screenshot below, five dates have been selected.

- To the right of the calendar is a button that says, "Add Times." Click this to choose specific times of day to offer to your participants. The software will let you choose the same times for all the days you've selected OR you can choose different times for each day depending on the availability of the Meeting VIP.
  - Let's say you want to choose 9-10:15 and 2-3:15 on October 2. Simply put in the first time slot you want and then click "Add More Times." Do this for as many separate slots as you need to.
  - It's a good idea to break out separate blocks of time for your meeting even if you have a wide availability on a particular day. For example, if your Meeting VIP is free from 1-5 p.m., and you need to hold an hourlong meeting, set up your Doodle to show four separate time slots: 1:00-2:00, 2:00-3:00, etc.
  - At the very bottom of this page, under the list of time slots, you will see a note that says, "The time zone of your poll is . . ." and then a specific geographic time zone. Doodle should be basing this on where it detects you are. See the Notes On Scheduling box in Scheduling Remote Meetings later in this module for more about time zones.

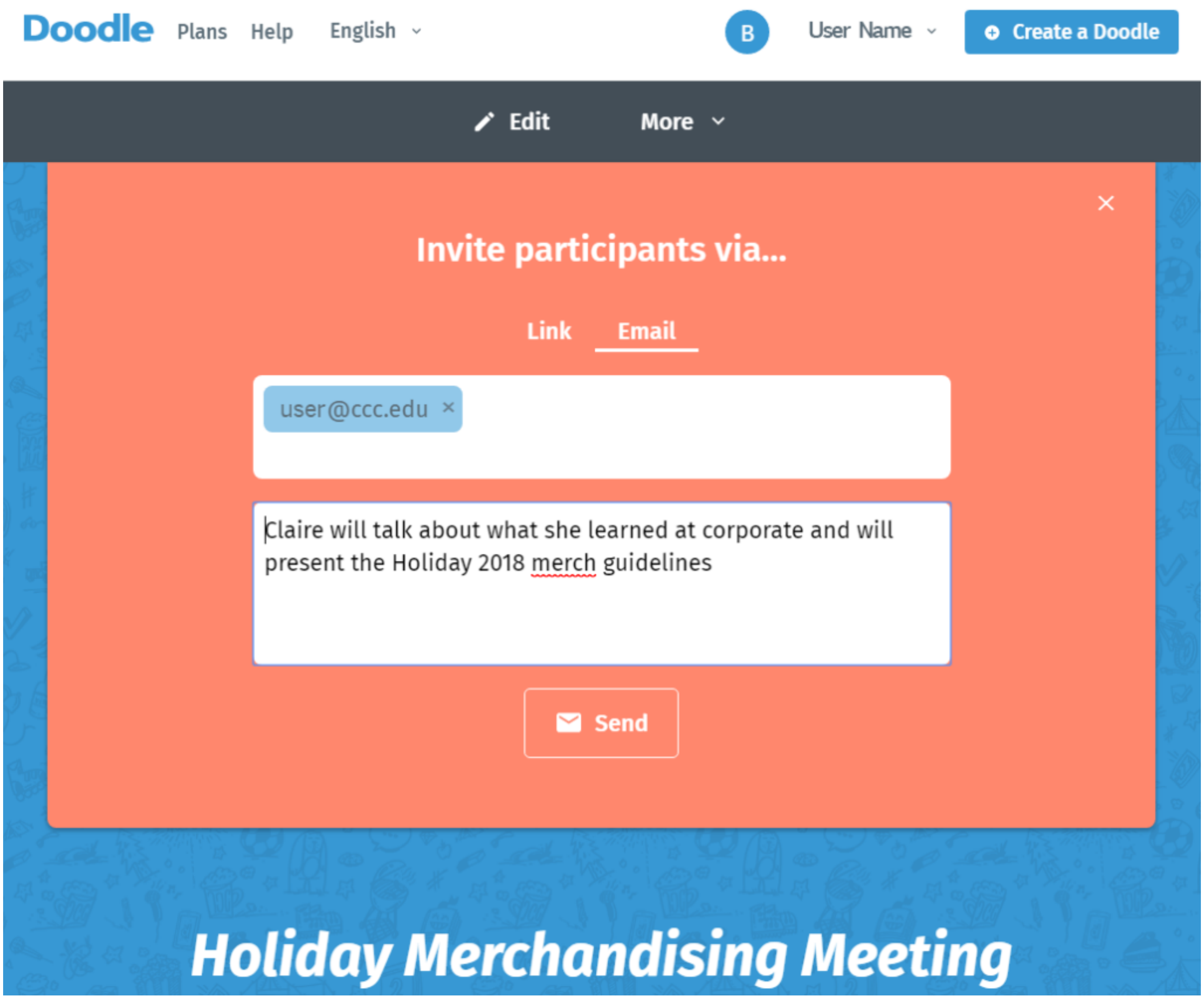


- At the bottom of this page, there's a button called Settings. Click on this to make some choices about how you want people to respond to your poll.

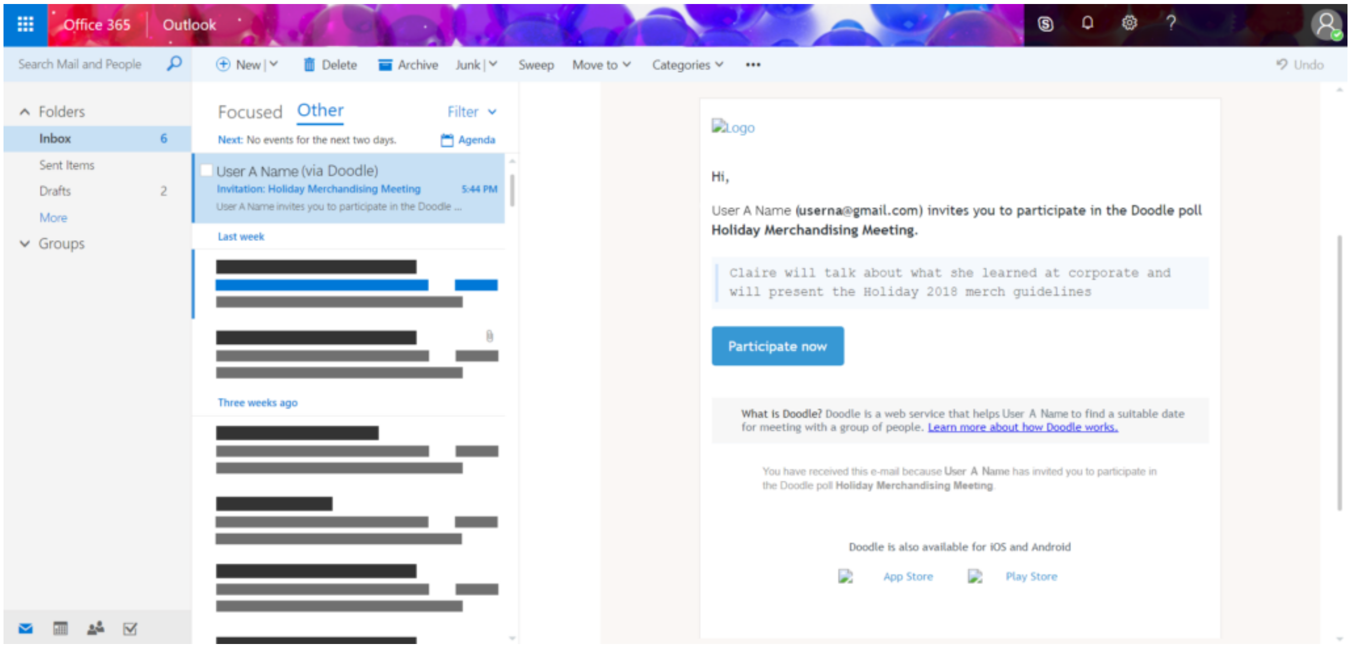


    - The first option—"Yes, No, If need be"—lets you give participants the option to say, essentially, "I can come at 2:00, but it's not ideal for me." It's up to you whether you want to give people that choice.
    - The next setting choice applies to situations like one-on-one meetings or activities where you want only a few people participating at a time. If you click on this, it lets you choose the number of votes per option. For a performance review, you would want only one.
    - The next setting lets you choose to give each person only one vote. This would be good for one-on-one meetings or other situations where you want to limit people to one option. For meeting scheduling, this option should be off since you want to allow people to note all the times they are available.
    - Finally, you have the choice to make responses anonymous. If you are conducting a poll, this might be useful. For scheduling, you will probably want everyone to be able to see who is available at what times.
    - Once you have chosen all of your settings, click Confirm, and you will be taken back to the scheduling page.
- Once all of this is done, click on Continue, and you will be asked to enter your name and email address. Click Continue again.
- You will end up at the invitations page. Here you have a few choices.
    - You can choose Link, which allows you to copy the link to the poll and paste it into an email you compose yourself.
    - You can choose Email.

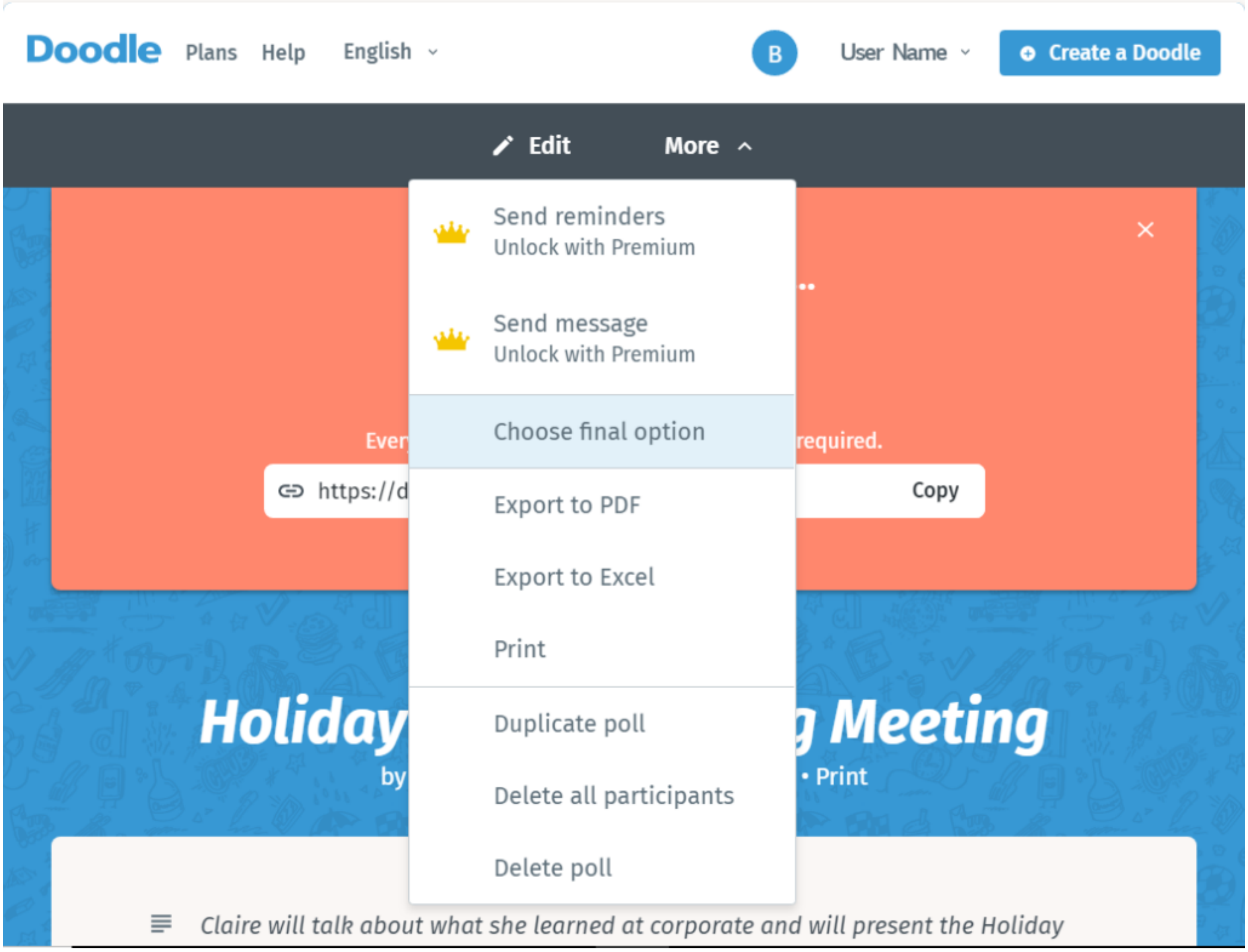
- This will allow you to enter all the email addresses of the invitees, and the system will send them an email with the link.
- You can then click Edit to see the message that will be sent. If you put anything into the Notes section, this will be the content of the email. Edit the message to be as clear as possible to your participants.



- Your participants will receive emails that look like this



- And every time someone completes the poll, you will receive an email letting you know. If that starts to drive you bananas, there’s a button to Unsubscribe From Updates at the bottom of your poll’s main page.
- If you want to check on your poll, log into Doodle and click on your dashboard. You’ll be able to see all of the polls you have running.



- Once everyone has responded to the poll, you can click on More at the top of the poll's main page. Then click Choose Final Option. This means that you've looked at the poll, seen when people are most likely to be available, and now you're ready to set the meeting time.
- The next screen will show you the final option you've chosen and offer to add it to your calendar.

PRACTICE QUESTION

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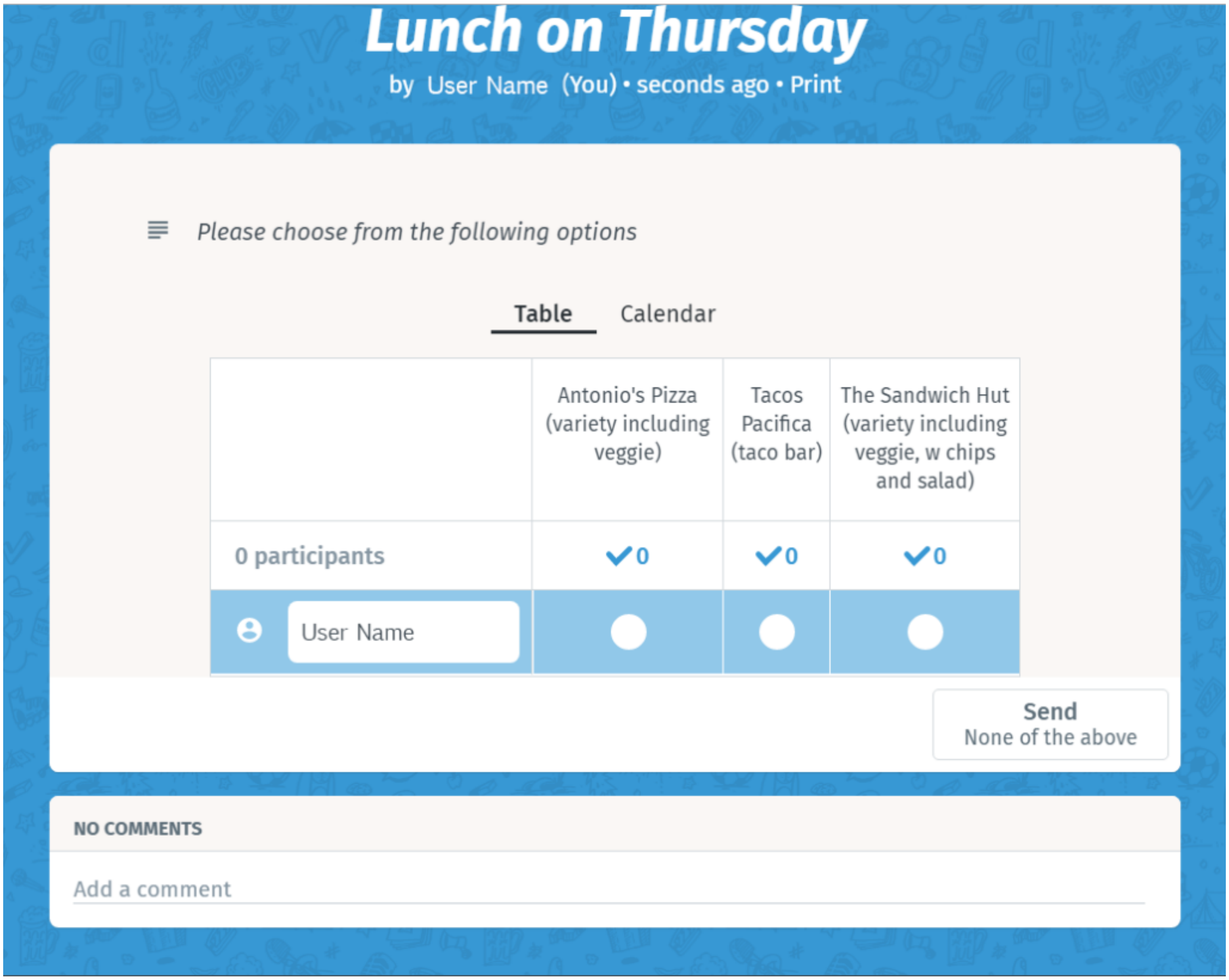
Asking a Question

To ask a question using Doodle, you go through pretty much the same steps. Let's say you want to ask what people would like for lunch during an upcoming lunch-and-learn. This time, from your dashboard, click Ask A Question. The title and note will be the content of your question. You will then go to a screen that lets you put in the options you want to offer. It'll look something like this:



The important thing with a question like this is to remember to limit people to one vote. Ed from the warehouse will vote for pizza twelve times if you let him.

You will receive updates just like you do for a scheduling poll.

Most other scheduling platforms, including Calendly, Polldaddy, and Zoomerang function in a similar way to Doodle. Depending on your needs and preferences, you might end up liking one more than another.

SCHEDULING REMOTE MEETINGS

What you'll learn to do: Schedule meetings with audio, video, and web sharing components

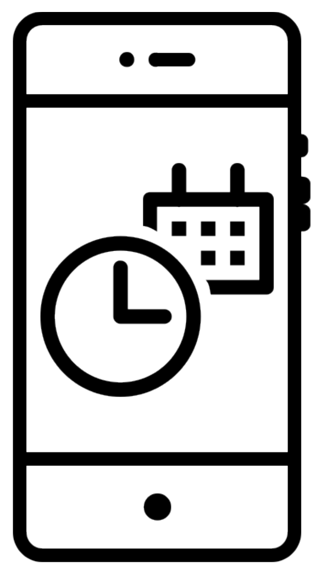
In this section, we're going to talk a little bit about meeting scheduling in general and then about specific guidelines for scheduling meetings that rely on technology.

LEARNING OUTCOMES

- Explain the key principles involved in scheduling meetings that use audio, video, and web conferencing technology
- Discuss best practices for scheduling remote meetings

Using Technology for Meetings

A Few Notes on Scheduling in General



The first thing to remember is to allow enough time for the meeting to actually happen. If you think it will take an hour, and everyone on the team is scheduled to leave at 5:00, don't schedule the meeting for 4:00 unless you have very specific reasons. You could end up with distracted participants who are watching the clock and not paying attention—or people leaving before the final decision or learning has wrapped up.

That said, if you have a team that tends to veer off topic or to overthink decisions that should be made quickly, planning a meeting with a hard stop at the end of the day can be useful. It's then up to you to remind them that Decision X must be made by the end of the meeting.

Think about the rhythm of your workplace when you decide on possible meeting times. Customer rush times, opening, closing, and lunch breaks all have their challenges.

Think about the level of energy and focus you need for each specific meeting. If you're going to be knocking promotional ideas around with no specific deadline, it's probably okay if people come and go a bit as needed. If you have to make a strategic decision that will affect the next three quarters, you want to be sure you have everyone's full attention.

Specific Challenges of Scheduling Remote Meetings

The main challenge of remote communication is that, well, technology doesn't always work right, and people aren't always as comfortable with it as you'd like. As cool and convenient as remote communication can be, it can also make you long for a nice, simple in-person meeting.

So how do you combat the challenges technology can throw at you? There are some universal guidelines and then a few that apply to specific situations. In general you should follow these two rules of thumb:

- Add fifteen minutes to the amount of time you'd schedule for the same meeting in person. For example, if an in-person meeting would take an hour to cover the content, schedule an hour and fifteen minutes. This should give you enough time to help people get logged in, troubleshoot any technical challenges, and still cover all of the content. If everything goes smoothly, and your meeting ends early, you probably won't have any complaints.
- If you think there will be a lot of discussion or Q&A, you might want to add even more time. In a later section, you'll be learning about the challenges of simply conversing remotely in a group—especially if you're using audio only. Add on another ten or fifteen minutes for the difficulties this might present.

There are a few helpful preparations you can recommend to your participants, especially if they are using a type of technology or a new platform for the first time:

- Recommend some YouTube videos that show how to login to the platform and participate using the various features. Again, make sure you choose recent videos since companies are continually upgrading and adding features.
- Recommend that they log in from the device and location they will be using during the meeting in advance. Even if nothing is going on in the virtual meeting space, they will know that their tech meets the site requirements, and they'll have a chance to bookmark the site, save their login information, and look around a bit. They may also need to download an app or a plug-in, which can take time.

These will familiarize them with the platform, cut down on their anxiety with using it, and hopefully reduce technological glitches during the meeting.

Time Zones

One of the benefits of using technology for meetings is that people can meet even if they're far away from each other. The catch to this is that distance leads to people being in different time zones. Within the continental US, this is usually not a big problem, but it can complicate matters quite a bit if you're in Scranton and you have colleagues in Shanghai. A helpful website for figuring out time zones is www.worldtimeserver.com.

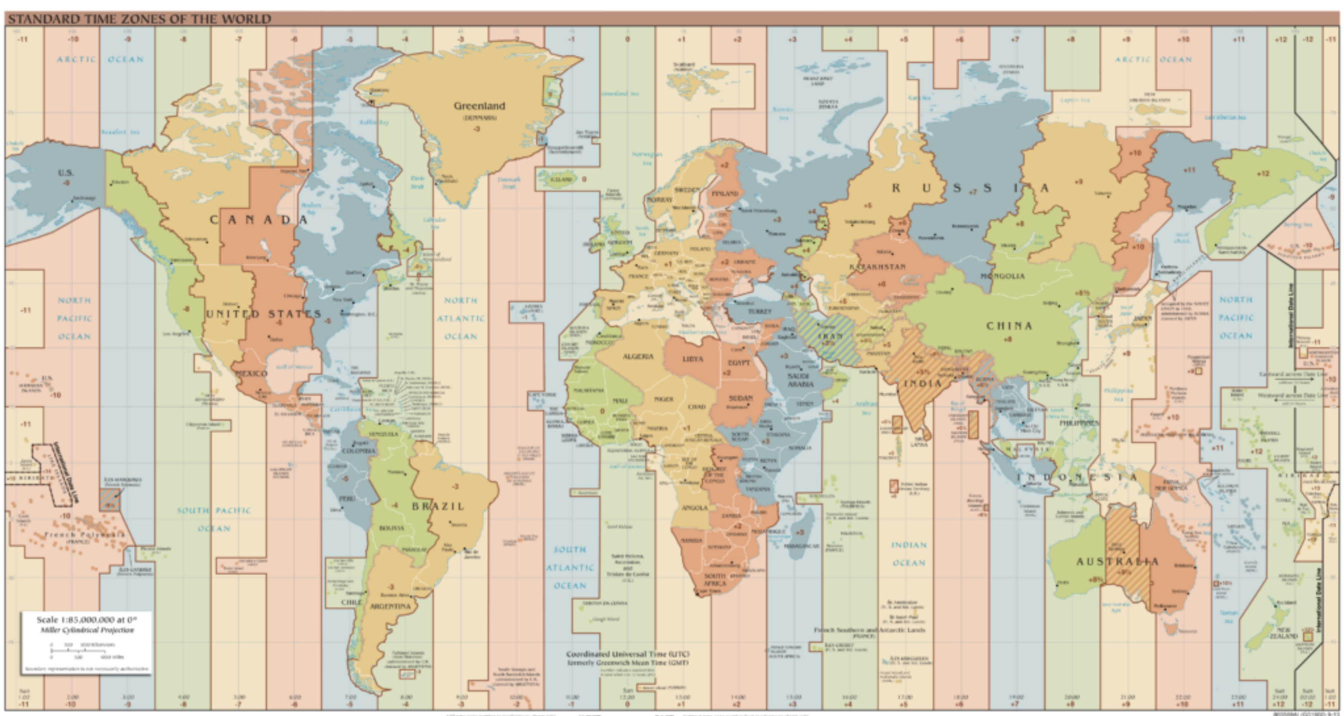


Figure 1. Standard World Time Zones.

Varied time zones will make your initial job of choosing time slots to poll on a bit more complicated. You want to be sure that you are choosing times when the most people are likely to be awake and at their desks. If it's an international meeting, you might just have to accept the fact that there will be some sleepy participants, but do your best to accommodate the most people.

Most polling software detects the locations of your participants and shows the available times in their time zones. For example, if you set up a time slot for 4:00 p.m. in Chicago, your colleague in Los Angeles will see it as 2:00 p.m. in their invitation.

Keep in mind that if you have participants who are very far away, they might not even be having the meeting on the same day as the rest of the team. For example, a meeting that takes place a 3:00 p.m. on Tuesday in Boston will be at 4:00 a.m. on Wednesday for the teammate in Tokyo.

PRACTICE QUESTION

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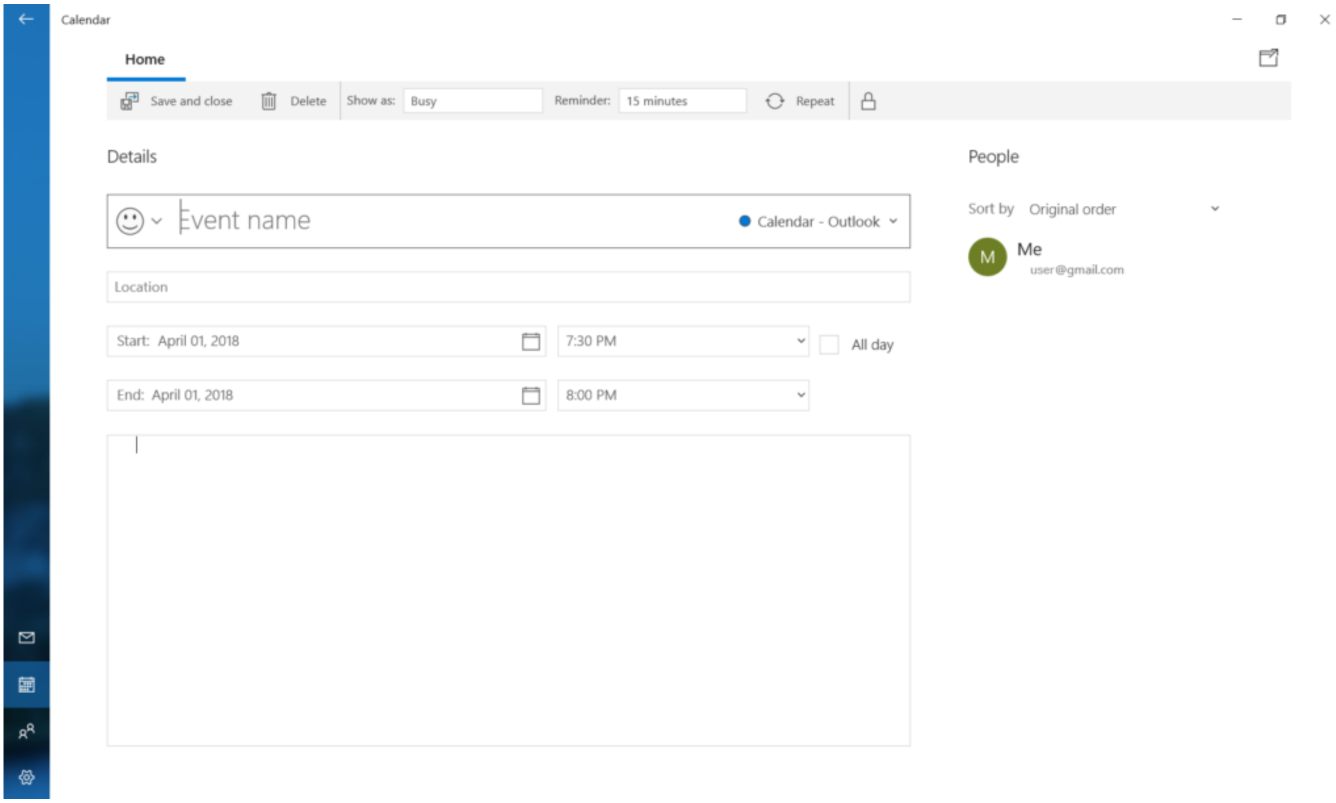
Scheduling Remote Meetings

If your entire organization uses the same calendar software, you can actually use features on the calendar to help you find meeting times. For example, in Outlook or Google Calendar, you can choose the invitees and then have the calendar search for when in a given day or week they all have a free hour. There are a few things to be aware of though if you use this method:

- People don't always calendar every event, so you should still confirm the time you are considering with an email—or a poll if the team is big enough for that to make sense.
- You may be able to choose whether guests are Required or simply Invited. This lets you focus on the people who really need to be at the meeting vs. those who might find it interesting.
- Most calendar software allows you to set reminders for yourself and/or your participants. Think about what's most useful. For a remote meeting, consider one reminder the work day before and another about fifteen minutes before.

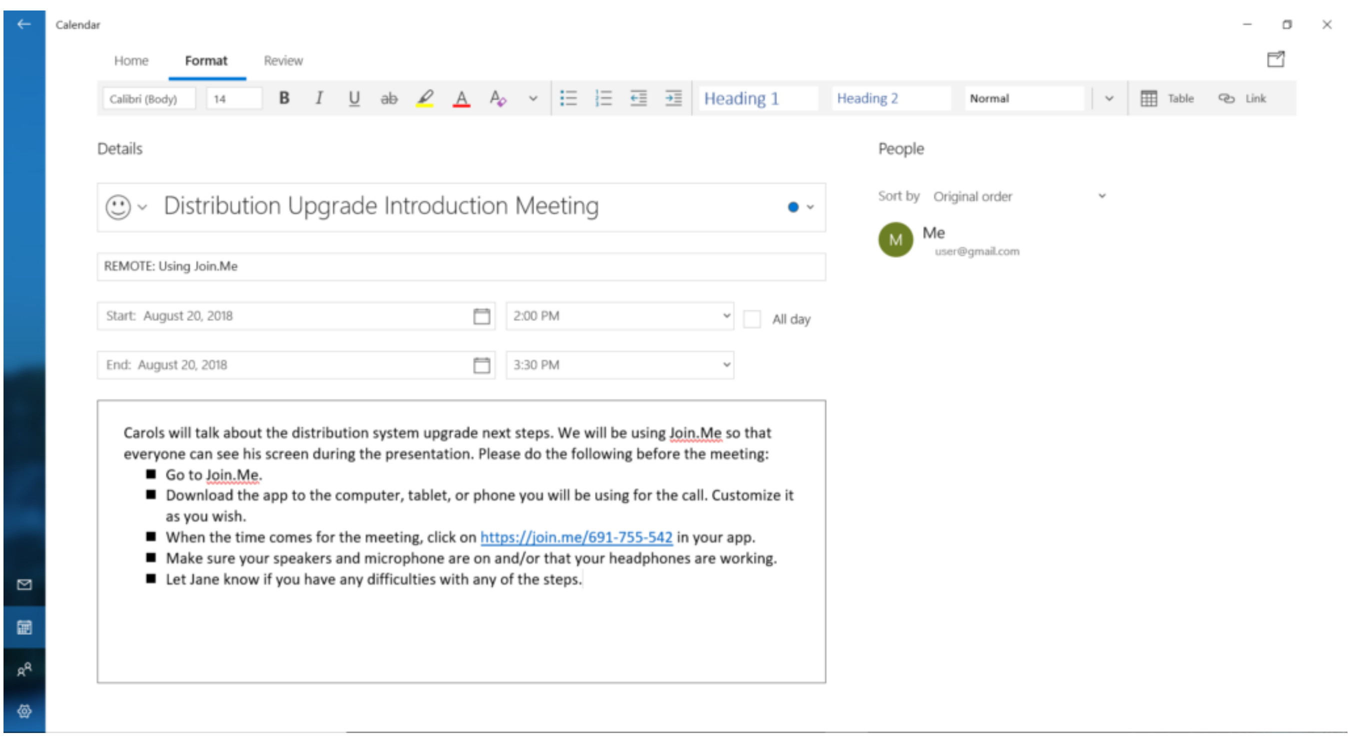
Once you have polled your participants and settled on a meeting date and time, you need to get the event on their calendars. Unlike a face-to-face meeting where all the information they need is the topic, date, time, and location, remote meeting invitations require more details.

Let's start our example using Microsoft Outlook. Here's what it looks like when you click on New Event in Outlook.



Create an informative event name, and fill in the date and times.

Then in the notes box at the bottom, add the login information with live links, like this:



You may not get everyone to go through all the steps in advance, but at least a few will do so. Also, by including all the directions in the calendar event, you are making life a lot easier for the people who don't start thinking about the call until five minutes before it starts.

Oh, and do put it all the same bullet points in an email anyway.

If you use Google Calendar to schedule your remote meeting, there are a few different features to be aware of.

- If your meeting is taking place in Google Hangouts, there's a button to click to choose Hangouts specifically.
- You have more choices about how reminders are delivered: an email or a pop-up on your screen, for example.

Mac Calendar works much the same way.

If your team uses a virtual office environment like Slack or Amazon Chime, there's a calendar integrated into those platforms that connects calendars with web sharing, audio, or video conferencing apps.

Also, some web sharing and video conferencing platforms have their own invitation protocols that lead participants directly to the link for your meeting and will populate whatever calendar program your team uses.

PRACTICE QUESTION

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AUDIO CONFERENCES

What you'll learn to do: Use audio conferencing tools effectively in a business context

Having a meeting with more than two or three people using audio only may seem like the most instinctive way to meet if you can't meet face-to-face. However, audio-only has its limits, and in this section, we're going to talk about how to overcome those limitations and maximize call efficiency and effectiveness.

LEARNING OUTCOMES

- Recognize the strengths and weaknesses of audio in a business context
- Identify the five stages of a telephone conversation
- Identify strategies to increase comprehension and reduce misunderstanding in one-on-one telephone / VOIP communications
- Identify strategies to increase comprehension and reduce misunderstanding in group telephone / VOIP communications

- Participate in a meeting with audio sharing components

Using Audio in Business

The strengths of audio—as compared with written communication—are appropriate in a lot of business situations.

A conversation is **synchronous**. That is, everyone is participating at the same time. Email or IM is **asynchronous**, meaning you may not get a response right away, and when you do hear from other people, their responses are usually carefully considered and edited. Sometimes, this is good, especially if you want people to spend some time on a question or idea.

However, there are situations when you don't necessarily want this, and audio represents a stronger choice:

- When a decision needs to be made quickly, you don't want people to take their time to answer an email and then respond to all the other emails they receive on the topic
- When it's helpful to hear people's tone of voice so you can gauge their certainty, enthusiasm, or other emotion
- When you want to ensure that everyone has understood what's being said; conversation allows people to ask questions and clarify their comments in the moment, which can cut down on confusion later

Audio is generally also pretty easy. Everyone understands how to work a telephone. Even if there are steps to go through to get on a conference line, it's a relatively unintimidating technology. This also means that having audio in place as backup for more complex technologies is always a good idea.

Audio does have its **downsides**, especially compared with other, more sophisticated methods of remote conferencing.

- While audio does allow you to hear emotion in people's voices, it doesn't let you read facial expressions, which can be helpful when a topic is sensitive or challenging.
- Another aspect of not being able to see faces is that people tend to interrupt each other more because there are no visual cues that someone is starting to speak or intends to keep speaking.
- Audio-only also allows people to be distracted or to engage in multitasking while still technically being "on the call" since no one can see what they're doing. The result of this is that you have people dialed in but tuned out.
  - Colleagues may be checking emails or reading other materials while on the call, especially if they are not expected to participate much in the conversation.
  - One consultant who works from home confessed that he used monthly board meeting calls as an opportunity to clean the cat box while on the call.

As we will see in the sections that follow, sometimes video or screen sharing offers a more effective means of remote conferencing, but if audio does what you need it to, it's easy and familiar.

PRACTICE QUESTION

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Stages of a Telephone Call

Setting aside for the moment large dial-in experiences such as presentations or meetings in which just a few people will be doing all the talking, there are five stages to one-on-one and small-group business conversations via audio:

1. Openings and Greetings
2. Establishing Expectations
3. Content, Conversation, Business
4. Wrap-up, Next Steps, and Feedback
5. Closing

If you're talking to just one or two people, calls can be pretty spontaneous. If you are talking to a larger group, these five stages assume that you have sent an invitation with some detail about the purpose, length, and expectations of the call.

Openings and Greetings

In a one-on-one call, you can simply exchange greetings as you would with a friend.

DAVE: (answering phone): David Jeffries.

LANIE: Hi Dave, it's Lanie. How are you this morning?

DAVE: Hi Lanie, I'm fine, how are you?

LANIE: Great, thanks.

In a group call, the call host generally establishes who's on the line and greets each person as they dial in. If the call is unusually large, the host might do a roll call to be sure everyone has dialed in.

CHARISSE (the host of the call): Hi everyone. Thanks for calling in. I know we have Lori, Sophia, Charles, and Rudi on the line. How are you all doing?

GROUP: Fine, great, still sleepy, etc.

CHARISSE: Are Michael and Ginger on the call yet?

MICHAEL: I'm here.

GINGER: Yes, sorry I'm a bit late.

CHARISSE: Great! Let's get started.

Establishing Expectations

Sometimes, this is called the "feedforward" section. In this part of the call, you establish two key points: the timing of the call and the topics to be covered. It sounds simple, but it's easy to forget, and it can lead to frustration if expectations are different among the people on the call.

In one-on-one situations, this is really all you need to do:

LANIE: Do you have fifteen minutes or so to talk about the last batch of job applications we received?

DAVE: Sure. I have another call at ten o'clock, but I'm all yours until then.

In a larger group setting, you should also address how elements of the call—such as questions and answers—will be handled.

CHARISSE: This call is scheduled to last until 11:00. What I'd like to do is to let Lori and Michael tell us what they learned at their store visits. Michael will go first and tell us what he learned about merchandising and then Lori will discuss operations. I'd like to save Q&A for the end so that both of them can get through everything they have to say.

Content, Conversation, Business

In this part of the call, the work gets done. This is the part of the call people prepare for, but it goes much more smoothly if you remember to include what comes before and what comes after.

Wrap-up, Next Steps, and Feedback

Once the business has been conducted, the final task is to recap the conversation and set next steps, if there are any. This is pretty much the same for both one-on-one and group conversations. In a group call, it's especially important for the call leader to make sure she's left time for this stage. It shouldn't be rushed or feel like an afterthought.

LANIE: This has been really helpful, Dave, thanks. So you will review and sort the applications for assistant manager, and I'll go over the ones for stockroom staff, right? Then we can talk again on Friday about which ones to interview.

DAVE: Sounds good. If anymore assistant manager applications come in, just email them to me, okay? Oh, and I have a dentist appointment on Friday afternoon, but I can talk any time before 3:00.

LANIE: Great, I'll send you a meeting invite through Outlook.

Closing

This is where you say good-bye and thank you just as you would in a personal conversation.

DAVE: Thanks for taking the initiative on this call. I'll talk to you soon!

LANIE: Have a great day, Dave. Bye!

PRACTICE QUESTION

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One-on-One Audio Calls

In many ways, one-on-one calls are the easiest because they are the most familiar. However, this familiarity can also lead to people being underprepared for the call and wasting time, which is frustrating for both parties. Needless to say, you shouldn't eat or chew gum during the call; a quiet sip of water now and then is fine. You should also make sure you complete all five stages of the call.

If the call is planned and on the calendar, make sure you call on time. It's human nature to feel more pressure when several people are waiting rather than just one, but it's no less rude to that one person when you're late. If the call is unplanned and it's likely to take more than a few minutes, it's courteous to send an IM or email asking whether the person is available now and letting them know how long the call may take: "Hi Dan, are you free to talk for about 20 minutes right now? If not, might you have some time before the end of the day? Thanks."

Listen as actively as you talk. No matter what means of communication you are using, this is one of your most important guidelines. A lot of time and confusion is saved when people actively listen to one another rather than thinking about what they're going to say next.

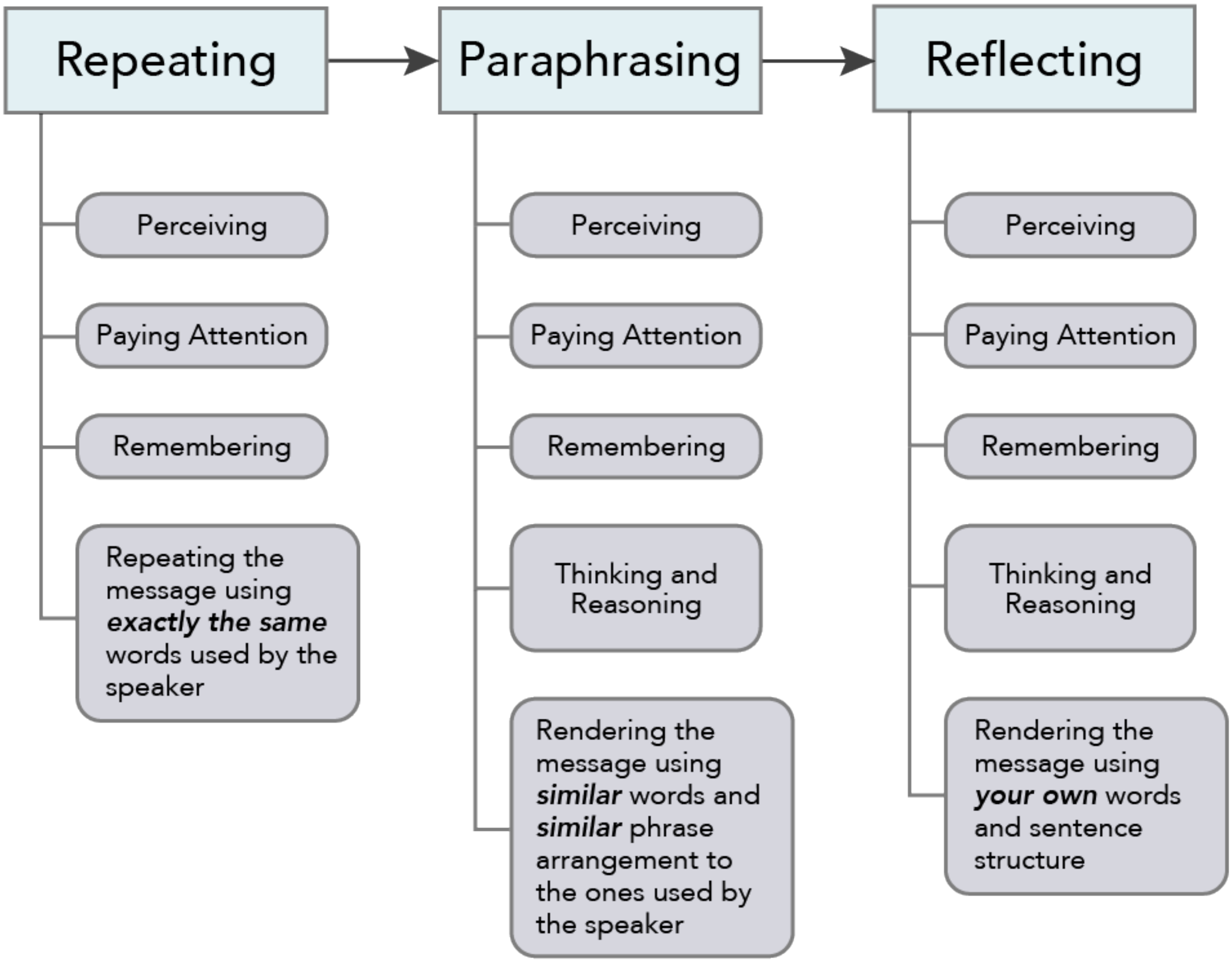

Figure 1. Degrees of Active Listening.

PRACTICE QUESTION

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Because of quirks in the technology, using more complex systems such as VOIP on your laptop or conferencing applications can make calls a bit more complicated even when it's just you and one other person. As we have already discussed, allow a bit of time when scheduling the call to make sure that you can attend to technology issues and still get your important business done.

If there's a staticky or hard-to-hear line, there are a couple of things to do:

- Find out where the other person is calling from. If they are outside or at a busy coffee shop, the background noise behind them may be what's making your call hard to hear. To fix this, they can either move to a quieter place (which may mean rescheduling the call), or mute their phone when they are not actively talking. However, muting can be pretty inconvenient if there are only two people are on the call since there will likely be a lot of back-and-forth conversation.
- If it's the line itself, hang up the call and dial back in. You are likely to get a clearer line on your second try.

If one person cannot hear the other, there are a few things you can try. Let's go back to Dave and Lanie's call and assume they are using VOIP through their laptops. If Lanie can hear Dave just fine but he can't hear her, he might try the following solutions:

- Dave should check to make sure that his speakers are on and the volume turned up. There are a few places on a laptop to check this.
    - On a PC, at the bottom-right corner of the screen, there's a speaker icon. If that icon has an X (or a circle with a line through it) next to it, that means the speaker is on Mute. If there's no X, click on the speaker anyway to see how far the volume is turned up.
    - On a Mac, the volume control icon is at the top right of the screen. If there are no waves coming out of the speaker icon, your Mac is muted.
- If either Dave or Lanie is using a headset or headphones with a microphone, they should both make sure that the headphones are plugged all the way into the proper jack on the laptop. If they're using Bluetooth headphones, they should make sure the Bluetooth connection is established.
- If the problem is not with Dave's speakers or anyone's headset, Lanie should check her microphone settings.
    - If Lanie is on a PC, she'll go to Settings in the Windows menu and search on Microphone. She'll make sure the mic is set up. Then she'll check her microphone privacy settings to be sure she hasn't blocked the app she's using from access to the microphone.
    - If she's on a Mac, she'll click on the System Preferences icon and then click the Sound icon. She'll make sure the Internal Microphone is chosen and then adjust the Input Volume to be sure she can be heard.
- If none of that works, they may need to start over with a new line or switch to a regular phone call.

If there's an echo on the line that makes it hard for one or both people to hear, this can really mess with the pacing of the call and be frustrating for those involved. There are a few steps you can take to eliminate this problem.

- Ask whether either person is using their speaker instead of their handset. If multiple people are using speakers, this can cause an echo. The more people on the call, the worse this can get. The solution is to ask people who don't absolutely need to use their speakers to switch to their handsets. Using cell phones can sometimes make this even worse.
- Restart the call to get another line.

One more thing to take into account when using VOIP, especially through a laptop or tablet, is that there may be a delay between what the speaker says and when the hearer hears it. This is why active listening is so important. Take the time to be sure the other person has finished speaking, and have some phrases ready to use if you get interrupted because of the delay. Here's what to do:

- Acknowledge the delay: "We seem to have a little bit of a lag in the audio. I want to make sure you get to finish your thoughts before I start talking, so please let me know if I interrupt you."
- When you step on someone else's conversation: "Sorry, please continue."
- When someone steps on your conversation: "I'd like to finish that thought, and the sound delay got in the way. If I could have one more minute . . ."

Group Audio Calls

Group audio calls, or conference calls, are like one-on-one calls on steroids. All the rules apply, and they are even more important. Again, because phone calls—even group calls—feel so familiar, you might be inclined to skip some of the five steps of a phone call. However, doing this decreases the effectiveness of the call and can lead to people feeling frustrated or unheard.

Leading a Call

To start with, be sure you invite the right people to participate. The more people who are on a call, the more chaotic it can become. Make sure you invite only those who are crucial to the conversation, rather than simply inviting anyone who might be interested. Remember, you can always send a call summary afterward via email to those who are not essential to the call. Some apps also allow you to record calls and share them later.

> ### REMEMBER
>
> If you will be recording a call, everyone participating should be aware of the recording in advance. In some states, it's illegal to record calls without permission from the other participants.

As possible, schedule the call in advance and give participants the necessary information about the technology, including call-in numbers or applications you will be using. You should at least have a basic agenda. Even if it's a recurring weekly call, make sure you've thought about how time will be spent and what the priorities are for this week. Go through all of the five stages of a call. Setting next steps is especially important in a group setting so people feel their time has been well spent and know what's expected of them going forward.

In addition, there are some best practices that make conference calls easier for everyone to follow:

- Energy—or the lack of it—can be a big problem for audio-only conversations. Since you can't see the responses or sense the energy from other participants, you may feel like you're speaking into a void, especially if you have a large chunk of information to present. Believe it or not, your physicality—even when you're alone in your office—can help a lot with how energetic and engaged you feel and sound.
    - If you have a headset that allows you to leave your chair, stand up or even walk around while you speak. If you pretend you're presenting in person, the energy of that type of presentation will emerge.
    - If you can't leave your chair, sit up straight and act as though your colleagues are really there in front of you.
- As was mentioned in the section on the Five Stages of a Call, let people know how the baton will be passed from one speaker to the next. If there are specific people who will be leading parts of the conversation, make that clear.
    - If you have fewer than five people and/or an established team, conversation should flow pretty naturally without you needing to formalize a process.
    - If you have five or more people, or if you're afraid of the call descending into chaos, specify upfront that you will take Q & A at the end of the call or at the end of each of the sections or speakers. If you choose this last option, you or the most recent speaker should be the one to ask, "Is this clear? Are there any questions specific to what Ellie said?"
- Do time checks. Since people won't be able to read each other's cues, those who are speaking won't be able to see the urgency in the faces of those who want to join the discussion. By mentioning how much time is left in the call, you are gently reminding people not to monologue or take over the conversation. Generally, checking in at the halfway point, with fifteen minutes left, and then with five minutes left is a good plan. You can say something like, "I want to do a quick time check. We have fifteen minutes left and two agenda items yet to discuss."

Technology actually lets you mitigate some of the challenges presented by having a whole bunch of people on one phone call.

- As long as it fits with the purpose and objectives of your call, you can ask people who are not actively taking part in the conversation to mute their lines. Office phones and smart phones have mute buttons that are pretty easy to find, as do most VOIP apps that you would use on your laptop. If several lines are muted, the amount of static and extraneous noise on the call is reduced significantly.
- Ask people to mute the other alerts on their computers or smartphones. You can do this in your pre-call email. This way, you won't hear a duck quack or a submarine ping sound every time someone on the call gets a text or an email.

PRACTICE QUESTION

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Participating in a Call

So far, we've mostly talked about conference calls assuming that you are the leader or planner. But there are ways to be a good participant on calls that other people are leading.

- Call in a couple of minutes early so that people are not waiting on you. With most third-party call-in apps, you will get hold music or silence. You can keep doing your work while you're waiting, but you'll be ready to go as soon as the host dials in.
- Plan to stay in one place just as you would for an in-person meeting. Sometimes, you have to get ready to leave or the call starts while you're on your way back from another meeting, but to the extent that you can, stay put.
- Mute your line if . . .
  - You don't expect to be doing much talking.
  - You are in a noisy place like a coffee shop or airport lounge.
  - You have to eat during the call. Chewing sounds drowning out the speaker is really pretty tacky.
  - You have a cold or allergies that make your bodily functions especially audible.
- Let the host or planner know in advance if you will need to join the call late or leave it early. That way, when people hear the notification sound, they won't wonder who's hung up and waste time asking.

Resist the temptation to check emails or surf online. If it's worth your time to be present at this meeting, you should really be present in body and mind. If you find it difficult to stay focused, take notes. Even if you don't need them later, taking notes with pen and paper will help you stay focused on the call.

Audio Meetings

You may find yourself planning or participating in a meeting that includes both people in the same room and people on the phone. We'll call this a hybrid audio meeting. Certainly, the same rules apply to hybrid meetings as apply to other types of group calls, but there's more to think about.

The main issue with hybrid calls is that the people in the room tend to forget about the people on the phone—literally forget they're even there. As you can imagine, this doesn't happen as easily with videoconferencing when you can actually see people's faces on a screen. So how do you avoid abandoning your remote colleagues?

- Remember to send them an agenda and any handouts or other materials in advance.
- Add extra time for technical difficulties just as you would if everyone was on the phone.
- Assign one in-person participant to advocate for the people on the phone. This is by far the most effective way to make sure that they have a chance to participate. This person should take the following steps:
  - Take the opportunity after every agenda item to ask the people on the phone if they have questions or anything to add.
  - Make sure that if anything is being shown in the room, it gets described for those on the phone. For example, if someone has a sample that just arrived, the phone advocate should describe it: "For those listening remotely, Maggie just showed us the new shopping bag prototype that arrived this morning. It's the same colors as the old one, but the design is really retro. We'll send you a picture after the call." Or if it's really important, the advocate should send a picture right away from their smartphone.

    - Explain laughter or other emotional responses that are not clear to those not in the room: “Hey phone people, the reason everyone is laughing is that the food delivery guy thought Charlie was the president of the company.”
    - If possible, set up an IM chat with those on the phone. This will allow them to ask for clarification or post questions without having to interrupt the flow of the meeting. Jumping into a conversation when you’re miles away is not always easy, and it can feel really awkward.
- If you have notes or an agenda for the meeting, add in “check with phone participants” at moments where it makes sense.
- Don’t forget that it’s a phone call for at least some of you, so go through the five stages with everyone.

PRACTICE QUESTION

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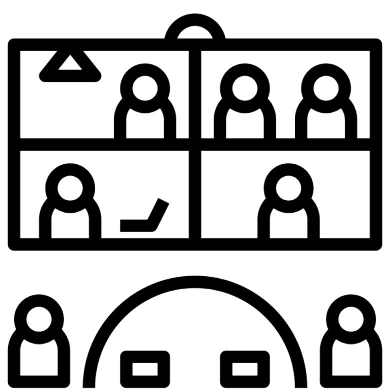
VIDEO CONFERENCES

What you’ll learn to do: Use video conferencing tools effectively in a business context



Many of the same guidelines apply to video conferencing as you would use for audio-only communication, but of course, there are additional issues to consider. Not only do you need to sound good, now you have to look good, too.

LEARNING OUTCOMES

- Recognize the strengths and weaknesses of video in a business context
- Identify strategies to increase comprehension and reduce misunderstanding in a one-on-one video call
- Identify strategies to increase comprehension and reduce misunderstanding in group video communications
- Participate in a meeting with video sharing components

Using Video in Business

Remember how in the section on audio communication you learned about not being able to see and read facial expressions? Well, for better or worse, videoconferencing allows you to do just that.

If you work for a large corporation with sites all over the country or the world, it's quite likely that you'll be using video conferencing, especially as you move up the ladder and have colleagues who are hundreds of miles away. The first thing to think about is **when** to do it, and then we'll go over **how** to do it most effectively.

Specifically, video conferencing is beneficial in the following situations:

- A team or committee is meeting for the first time and can't meet in person. Your new team members will be much easier to remember and differentiate if you can put faces to their names.
- The issue at hand is emotional or sensitive, for example, discussing layoffs, discussing employee reviews, conveying and discussing bad news, and conveying and discussing especially good news. Reading each other's expressions will be helpful in getting through the most difficult parts or celebrating the happy ones.
- There are team members who tend to dominate the conversation. Seeing others' faces can have the effect of toning that team member down without a leader or host having to say anything.
- Your team tends to talk over one another on audio calls. Because on a video call, everyone can see each other's faces, it's easier to read the signals when someone is not finished speaking or is about to start. This can minimize interruptions.
- Products, demonstrations, or locations have to be shown and video files or still pictures are insufficient or unavailable.

PRACTICE QUESTION

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There are not a lot of specific content—or purpose—related reasons not to use video conferencing, but do remember these two things:

- The more sophisticated the technology, the more likely you are to have bumps along the road to getting it working, at least initially.
- If it's a meeting across time zones, some people may be in their pajamas or at home. Depending on the team, this might be okay, but do take it into consideration.

Using the Right Device

There are two basic kinds of devices for a video call:

- A smartphone or tablet

- A laptop or desktop computer

The reason we're going to look at them separately is that the way we use them tends to be pretty specific, and the problems you may face with each are different.

Smartphones and Tablets

When making a one-on-one video call, you may be tempted to use your phone or tablet because it's what you use for video calls in your personal life. This is fine in some situations; in fact, a phone or tablet can be really convenient if you want to show something other than just your own face. For example, using these devices can make it easier for you to show someone the space you're in or for you to show and demonstrate products. However, these devices have some drawbacks you'll want to be aware of:

- If you move around too much or too quickly with the device in your hand, the viewer's screen jiggles and moves, and this can actually make people motion sick.
- The screens and camera ranges are relatively small, so you will need to be aware of how you are showing things to your colleague on the call.

Phone apps for video chatting include Facetime (which is standard on the iPhone), Google Hangouts and Google Duo, Facebook Messenger, Skype, and Signal Private Messenger.

Laptops and Desktop Computers

A laptop or desktop computer lives on the desk, so it's great for video chatting when the main point is to see each other's faces. You can also move items you want to show in front of the camera rather than moving the camera to the objects or places. This ensures a smoother, less sick-making experience for your viewer.

Let's talk about how to prepare for and conduct a video call.

First, you'll want to prepare yourself and your space.

- High-definition digital cameras are brutally clear and detailed, so take a moment to make sure you don't have spinach in your teeth or windblown hair that might distract the person you're talking with—and make you feel foolish when you discover it later.
- If there's a window in your space, position yourself so you do not have the window at your back. If it's bright outside, your face will be dark, and all your viewer will see is the halo of light around you. If you can, close blinds or curtains and rely on artificial light for the call. It's not as nice for you, but your image will be clearer onscreen.
- Be aware of what's behind you. A blank white wall or a file cabinet is fine. A shelf with your half-eaten sandwich or those reports you're behind on is not so great.
- If your office has a window to the hallway outside, consider whether you have colleagues who will find it hilarious to make faces behind your back. If you do, arrange yourself and your computer to avoid that window.

Troubleshooting Your Device

Now to think about the technology. Make sure that your microphone and speakers are on and turned up, just as with an audio call. In addition, make sure that the app you are using has access to your device's camera.

- Usually, if you download a third-party app such as Skype, it will ask for access to your camera during the installation process.
- If you are on your phone or tablet, you may need to go into the Settings menu to allow the app access to the camera.

One-on-One Video Calls

Since for most people, video calls are less common and less comfortable, you'll want to prepare for even the one-on-one chats more carefully than you would a phone call. Before each one-on-one, you should do the following:

- Let the person know what app or platform you will be using and give them login information if needed. The exception might be if you have a virtual office environment like Chime or Hangouts where video chats are common.
- Make sure you both have a strong Wi-Fi signal, especially if you're using your phone or tablet. Video over the cellular network eats your data allowance like a hungry alligator. Video chat is possible over the cellular network, but it's susceptible to more problems, such as dropped calls and choppy video.
- If you are using an app like Facetime, be aware that it might not be available in all locations around the world. A quick Google search will help you determine whether an international video call is possible using a specific app.
- If security is important, for example, if you're showing prototypes or discussing highly sensitive issues, check the security of your chat app. Signal Private Messenger is fully encrypted, and Google apps use Google security protocols. However, if you're using an unencrypted app and/or an unsecured WiFi network, be aware that you may be susceptible to digital eavesdropping.

Conducting the Call

In terms of content, a video call should follow the Five Steps just like an audio call. In addition, ask the person you're speaking with, "Can you see me clearly?" If the answer is no, try some troubleshooting.

- Check that your camera is on and uncovered.
    - On your laptop, there will be a light next to the camera that turns on when the camera is engaged.
    - Make sure your laptop cover doesn't block the camera.
    - Some people put tape or a piece of paper over their camera lens to prevent unwanted spying. While the jury is out on whether this is necessary for the average person, if you've done it, remember to remove the tape or paper before your call.
- Check that your microphone and speakers are on as discussed in One-on-One Audio Calls.

Once the call has connected, there are a few guidelines to remember to make your conversation as effective and pleasant as possible.

Look at Your Camera

The really crucial thing to be aware of is that the camera is not in the middle of your screen, it's up at the top. If you look at your screen when talking, the person you're speaking with sees your downcast eyes, which negates the benefits of being able to read facial expressions.

In figure 1, the person in the top square is looking directly into his camera, so the man he is speaking with can see the speaker's full range of expression. The man in the bottom square, on the other hand, is not giving the viewer the full benefit of his gaze.

If you have trouble redirecting your gaze, put a sticky note at the top of your screen right next to the camera lens and write LOOK HERE on it.

If you are using an external camera attached to your computer, you may need to focus your gaze even further from the screen on which your colleague appears. This takes a bit of practice and adjustment.

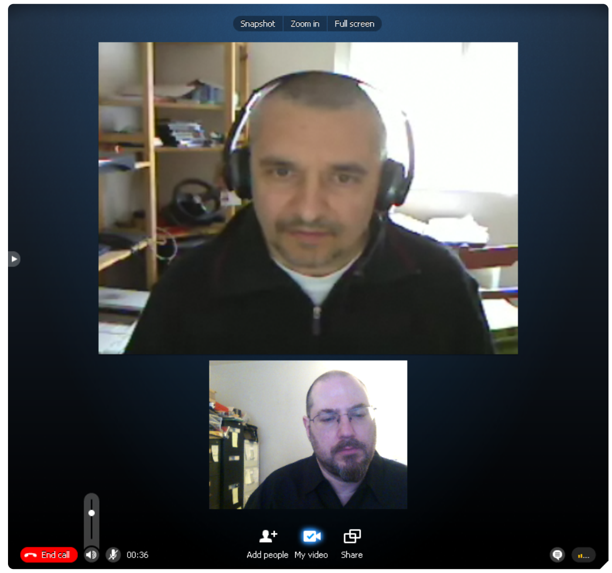

Figure 1. Pay attention to where you're looking!

Avoid Moving Your Camera

Lots of movement—even if you're using a stationary computer—can be dizzying for the person you're chatting with, so try to stay relatively still.

Maintaining the proper distance from the camera is also important. Getting too close is a total grandma move, or in the case of figure 2, a family one.

Figure 2. Moving your camera can suddenly make your video call an unpleasant experience.

Talk Distraction-Free

As with an audio call, it's important to be energized and free from distractions. Turn off or put away anything else in your space that might cause your attention to stray. Sit up straight throughout the call, and remember that the whole point is to see your face, so smile when appropriate.

Make Sure Your Video is Clear

As you can see from these screenshots, video chat platforms—including those on smartphones—have small windows where you can see yourself as you look to the viewer. This is great for making sure you're well-lit and at a reasonable distance from the camera. However, be careful of falling into your own image and paying more attention to how you look than what you're saying.

PRACTICE QUESTION

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Group Video Calls

For group videoconferences, start with the same basic guidelines as for one-on-one chats in terms of both your preparation and your technology. Group calls look different, however. As noted earlier, in a group videoconference, you can see the faces of all the people in the chat.

Figure 1. Group videoconferencing.

As you can see in figure 1, everyone is at a slightly different angle with different lighting and distance from the camera. This is pretty standard in video chats.

Sometimes participants are represented by still photos. This is often because they don't have the required bandwidth or are not in an appropriate place for a video chat. However, when they set up their login for the app they're using, they did take the time to upload a photo to act as a placeholder.

One technical issue to note is that sometimes, the voice and the image don't sync up all that well. When this happens, the most useful solution is patience:

- Wait until you're sure the person speaking is finished before you start to speak.
- Watch faces to check whether anyone else looks like they're about to speak.
- If things get chaotic, pay attention to the chat leader or host. Ideally, they will use both their voice and appropriate gestures to corral the call back into order.
- If you are the call leader, don't be afraid to use a hand signal—for example, a raised hand to signal STOP—if things get out of control.
- If you have an especially large group, you can ask people to raise their hands when they wish to speak, just as they would in a classroom. This means, however, that you as host/leader have to be on the lookout for raised hands.

PRACTICE QUESTION

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Video Meetings

As with audio, you may find yourself in meetings where some people are together in a room while others join via video chat. Generally, that looks something like the meeting in figure 1:

Figure 1. A hybrid meeting.

State-of-the-art video conference rooms have cameras that can follow and focus on whoever is talking, which is great for keeping the flow going, although these cameras have been known to stop on an elbow or a notebook rather than a face. Video conference rooms like the one above have one or more fixed cameras that are angled to capture the entire table. This creates some distance compared with group chats where everyone has their own laptop camera. However, it also gives a better sense of the energy in the whole room, which can be helpful to those joining remotely.

In the event that you have only one person joining by video chat and/or they are joining on a laptop rather than a large conference screen, you may wish to assign an advocate as discussed in Audio Meetings to make sure that person isn't forgotten and that they have a chance to participate fully in the meeting.

PRACTICE QUESTION

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WEB SHARING

What you'll learn to do: Use web sharing tools effectively in a business context

Next we're going to talk about what to do when it's more important that people can see your computer screen than your face. This includes sharing videos, presentations, and documents. This is a powerful capability, but it's also important to be cautious: you don't want to accidentally share either confidential materials or personal communications.

LEARNING OUTCOMES

- Explain when to use web sharing tools in a business context
- Identify strategies for effective use of web sharing in a one-on-one setting
- Identify strategies for effective use of web sharing in a group setting
- Participate in a meeting with web sharing components

Using Web Sharing in Business

Web sharing, or screen sharing, is appropriate when it's more important for people to see documents, videos, or other kinds of files than it is for them to see each other's faces or surroundings. Here are a few specific examples:

- Delivering PowerPoint or Prezi presentations to remote colleagues
- Sharing spreadsheet data
- Showing videos
- Editing or marking up documents or graphics

Usually, screen sharing happens in conjunction with an audio call. In environments like Google Hangouts or Amazon Chime, where it's easy to switch from a video feed to a screen share and where you can have audio, video, and screen sharing going on simultaneously, but this does take some practice.

To share your screen and talk about it at the same time, you can establish a separate dial-in number for the call and log in for the screensharing on a site such as Join.Me, WebEx, or GoToMeeting. You can also use the audio function that comes with those sites; the benefit of doing this is having a single login. However, the potential drawback is that the VOIP signal can, on occasion, get choppy if the Wi-Fi___33 network is overloaded.

PRACTICE QUESTION

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Troubleshooting

Troubleshooting a web sharing call can involve any of the audio issues we've already discussed. In addition, the following solutions may be helpful:

- If someone has not downloaded the app but is joining the meeting through the host platform's website, they should be aware that not all sites work with all browsers, and some are fully functional only with the app.
- If you are the presenter or host, have the files you'll be talking about ready to attach to an email and send just in case you can't get the web sharing to work for one or more people.
  - If this happens, remind them to stay on the audio part of the call.
  - Add the slide number or page number to your navigation language since they will be advancing the slides or pages themselves.

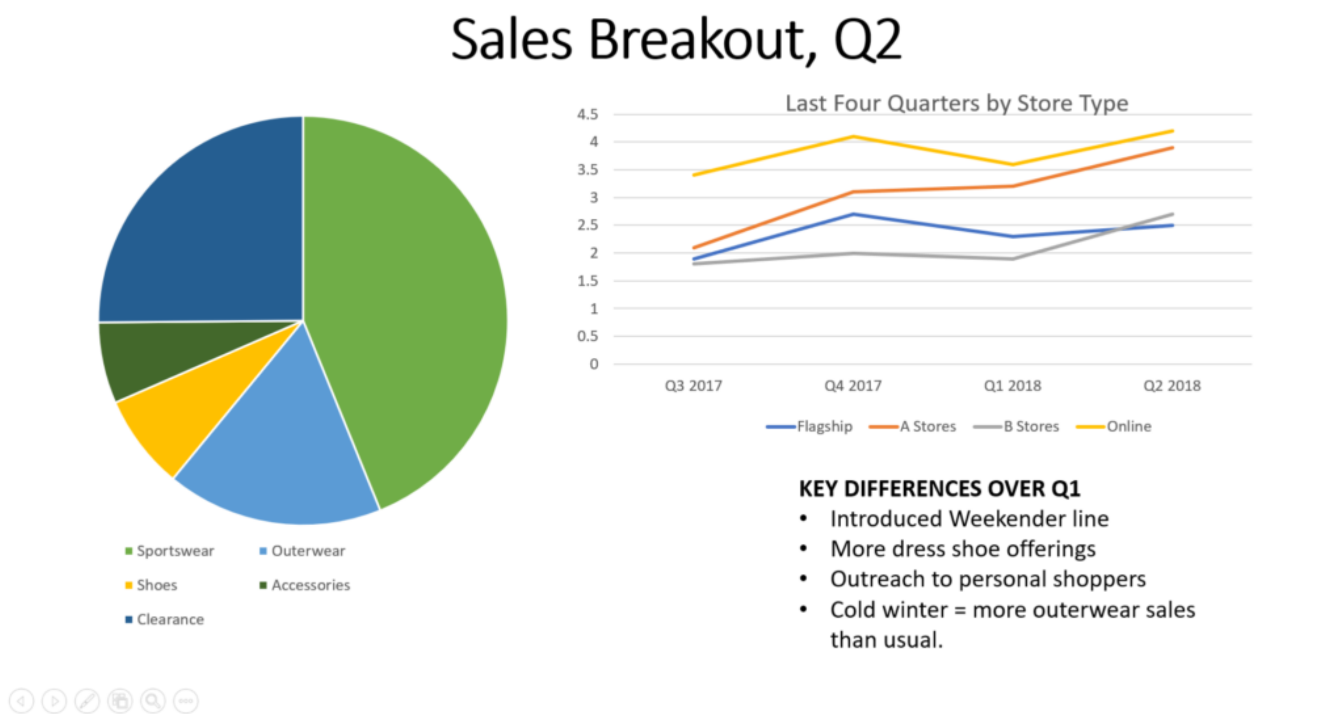
One-on-One Web Sharing Calls

In a planned call with a specific agenda, you will know in advance whether you want to share your screen with your colleague, so you can prepare for it by sending them connection information and making sure they have the right app at the ready. However, once you and your team are comfortable with your web sharing app of choice, it's pretty easy to share your screen, even during calls when you hadn't planned to.

When you're screen sharing, there are some etiquette tips you should follow:

- Make sure you have the correct file or site open before the call starts. It's impolite to keep your teammate waiting while your Excel or PowerPoint revs up.
- Close any unnecessary tabs in your browser and tidy up your desktop. Remember that the people sharing your screen can see your *whole* screen, including that sensitive email—or the fact that you have Facebook and OKCupid tabs open and your desktop image is you in a gorilla costume.

A major challenge with screensharing is that the person you're sharing with can't see your physical gestures. In person, you would simply point at the things on your screen that you want your colleague to focus on. When you're screensharing, you have to do a lot more talking. Let's look at a typical PowerPoint slide.



As you are talking through this very busy slide, you really need to narrate the navigation of the slide out loud. You might take your listener through it like this:

Goal	Dialogue
Tell them what the slide is about overall. Make sure you have a slide title that means something.	"This slide is a summary of the second quarter, breaking out sales in a couple of different ways.
Help them navigate around the slide by using directional language.	"Let's look at the pie chart on the left first. This chart shows the breakout in sales by category. As you can see, the green slice, Sportswear, is still our biggest-selling category, but Shoes, the yellow piece, is way up, and Accessories, in dark green on the left side of the chart, is holding steady."
If the content is complicated, you may want to pause for questions before moving on, but be specific that you're just taking questions on one area.	"Any questions about the pie chart or what it means before I move on?"
Clearly signal when you've moved on to another part of the slide.	"Now let's look at the graph at the top right. This shows quarterly sales in millions by store type. As you can see, all our channels are on an uptick for Q2. A stores and B stores—the orange and gray lines—did pretty well, especially at the holidays. There was a little dip after the post-Christmas sales, but they're back up again in Q2. Online sales—the yellow line—were reliable, but they're really taking off with the new spring and summer offerings."
Signal when you're wrapping up.	"Let's look at the bullet points on the bottom right where I've summarized some of the key factors affecting sales in Q2. . ."

IF YOU'RE SHARING A SPREADSHEET . . .

When sharing a spreadsheet, you should be sure to do the following:

- Take some time before the call to highlight key cells with color to help with navigation. That way, you can say things like, "We're done with the yellow rows now, and if no one has any questions, we'll turn to the green rows," or "I can send you the full spreadsheet later, but what's important for now are the cells outlined in red."
- Be sure to establish what the rows and columns represent, as in, "The rows are the weeks in the fiscal year. The pink columns represent sales by category in dollars. The blue columns represent sales by category in units. Column J is the total of all categories in dollars, and Column K is the total units."
- Use the numbers and letters for rows and columns to help with navigation.
- During the call, use your screen Zoom function to zero in on the areas that are relevant to the conversation.

IF YOU ARE SHARING A WORD DOCUMENT . . .

When sharing a Word document, you should be sure to do the following:

- In many ways, this is the trickiest, so ask yourself whether a screen sharing call is really the way to do it. Word documents are hard because they're usually just text with no particular landmarks to help with navigation.
- If you absolutely must go over a Word doc using screen sharing, prep the document beforehand with color or section headers to make navigation easier.

These tips may seem exhausting or elementary, but remember how distracted people can be in remote meetings. If someone zones out for even a minute, they can get seriously lost and confused about what you're discussing. Thus whatever navigation signposts you can use will be helpful to both of you.

PRACTICE QUESTION

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Additional features you can use in screen sharing apps really depend on the individual app.

Most allow you to switch among the screens of the people on the call, so if Lanie needs to see Dave's screen for a minute and then switch back to her own, just a couple of clicks can make that happen. In more sophisticated virtual environments like Amazon Chime and Slack, it's possible to mark up or edit the screen you see, even if it isn't your own. A touchscreen may be required for some of these functions.

Group Web Sharing Calls

The main difference between one-on-one web-sharing calls and group web sharing is that distraction and inattention increase exponentially with each person on the call. In a one-on-one situation, if the person you're talking to gets lost or needs more explanation, they'll just ask. In a group situation, they may be too embarrassed, or they may ask long after you've moved on. Thus, it is essential that as a presenter you do the following:

- Use navigation language. It becomes even more important with more distractions on the call.

- Regulate your pace so you don't speed through your information.
- Pause briefly between slides, worksheets, sections, or pages to help people recognize that you're moving on.

If you are sharing PowerPoint slides, animations can help people stay engaged. This is not to say that you should have text or images swooping in and dancing on the page. Rather, making your bullet points appear one at a time or having a piece of your pie chart flash when you start to talk about it can help your listeners re-engage with the slides.

Most web-sharing platforms have a chat function that you can choose to use. If you do, it's good to set some ground rules about how participants should engage with the chat. The chat typically appears as a running bar along the side of the screen that looks a bit like an IM thread. Participants can post questions or comments there. Think about using the chat if you are in any of these situations:

- You are anticipating a lot of questions, and you want to be sure to get through all your content. Having participants post their comments in the chat rather than asking out loud, can help a presenter accomplish the following:
  - Delay answering questions you know will be addressed later in the conversation.
  - Weed out duplicate questions.
  - Table off-topic questions so you can discuss them with the individual at a later time.
- You have a large group on the call, so even one question per person could really derail the rhythm of the meeting.
- You might want to ask poll-type questions of the group. For example, you might say, "Type in the chat area the number of loss-prevention reports you've filed so far this year." Knowing the answer to a question like this might help you shape and prioritize the rest of the meeting.

Skip the chat if you feel it might invite unwanted comments or side conversations, if the group is too small to need it, or if the purpose of the meeting is to have a discussion equally among all participants.

PRACTICE QUESTION

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Web Sharing Meetings

In a meeting where some people are together in a room viewing documents or a presentation while others are on sharing apps, the standard guidelines for hybrid meetings all apply.

In particular, since the people in the room won't see the remote participants while the presenter is sharing their screen, be sure to appoint an advocate for them and build in reminders to address them and include them in the conversation. This can sometimes be done with someone keeping an eye on a secondary app acting as the backchannel chat.

If the main speaker or presenter is remote from the group, the main challenge is to prevent side conversations from taking place while that person is speaking. It's really easy to ignore the disembodied voice on the speaker in favor of the live person next to you.

PRACTICE QUESTION

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PUTTING IT TOGETHER: COMMUNICATING THROUGH TECHNOLOGY

Now that you've learned the basics about communicating through technology today, you must remember that it's always changing. A year from now there will be platforms and apps available that haven't even been thought of yet. Your main goal is to remember these basic ideas no matter what technology you use the following will remain the same:

- The point of the meeting is the content of the discussion or presentation, not the technology itself.
- Your colleagues' comfort level with technology will range pretty widely. Be patient with them.
- The app that's scaring or frustrating you today will eventually be as easy as email. Be patient with yourself.

A successful interaction using any of the technologies covered in this module meets a few basic criteria, many of which are designed to alleviate the kinds of bad surprises technology can sometimes involve.

In general, to ensure a successful interaction using communication technology, the host or planner has done the following:

- Practiced with the technology.
- Planned the scheduling of the meeting to include enough time for participants to download software, if necessary, and make sure it runs on their systems.
- Sent clear instructions to participants well in advance and done her best to simplify the process for them as much as possible.
- Created at least one back-up plan—preferably two—in case the technology doesn't work for everyone.
- Planned the timing of the meeting to allow not only for the content to be covered but also for the additional minutes needed to be sure everyone is up and running.
- Sent an agenda to participants that includes time for the technology.
- Learned how to present information, conduct discussion, and generate next steps appropriately and effectively within the technology platform being used.
- Conceived a plan to follow up with information, notes, conclusions, and next steps after the meeting has concluded.

The point of communication through technology is to get work done efficiently, and the best way to do that is to have a toolbox of possibilities that you feel comfortable with and that meet your needs. The ability to communicate through such a wide variety of channels opens up your work life and helps you be a better leader, employee, and colleague.

MODULE 10: SOCIAL MEDIA

WHY IT MATTERS: SOCIAL MEDIA

Why use social media to present business messages?

While the *content* of business communications should be the central item of concern, there is no question that the type of media used to express the message is important. Social media, which has its origins all the way back to the 1970s ARPANET, or the original web, presents society with many conflicting and competing concepts. Some consider social media one of the greatest developments of the modern age, and people can be seen every day using their phones to connect with people across the world. However, others consider social media to be something sinister that saps real social connections and harms our ability to communicate more meaningfully.

Taking stock of where you personally stand on these issues can be an interesting exercise, and will most certainly affect your perspective on social media use in business. Most social media in business is used around two or three main functions, which are largely oriented around business marketing:

1. To bring services or products to market; that is, to increase awareness.
2. To engage customers, often with respect to service issues or problems.
3. To encourage a "buzz" or interest around a company, its product(s) or its service(s).

Do these seem useful, correct, interesting and helpful? Most certainly, bringing new products or services to market requires a well developed marketing plan. While marketing is outside the scope of this course, it's easy to see the importance of and relationship between business communication and marketing. The relationship is around increasing awareness: have you helped your customers—external or internal (Note: **internal customer**: another member of your own organization, especially a non-executive or non-manager)—to make meaningful decisions?

The following video explores the importance of social media in business communications.

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Note the emphasis on awareness, especially awareness gained via relatively inexpensive and commonly found means. We might position *inexpensive awareness* as our core concept for social media and business communication.

In this module, we will address which platforms are the most popular. We will also look at why they are popular for a given type of message or communication. Lastly, you will gain insight on which type of social media might be best for your organization.

COMMON SOCIAL MEDIA PLATFORMS

What you'll learn to do: Identify common social media platforms used by businesses

Facebook alone now has over two billion users. YouTube follows with 1.5 billion users, and Instagram has over 800 million. Figure 1 shows the relative size of these and other popular platforms. (Note: Kallas, Priit. "Top 15 Most Popular Social Networking Sites and Apps [July 2018]." *Dreamgrow*. July 3 2018. Web. July 10 2018.)

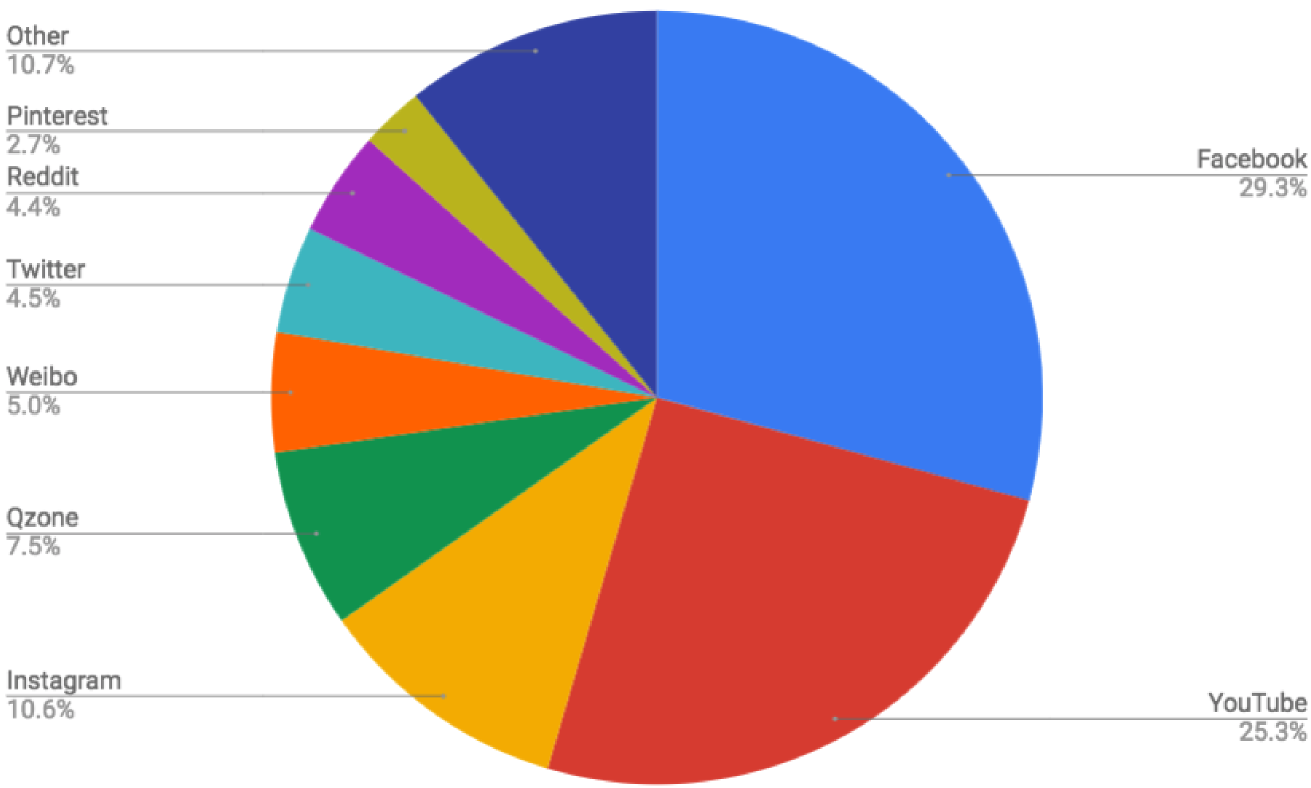

Figure 1. Monthly Active Users on Common Social Media Sites

Note the size of Chinese Weibo and Russian Qzone sites. Both are widely popular outside the US. If your business interests are global and focus on these countries, some attention should clearly be given to these as well.

Interestingly, Twitter lags in size at around 330 million global users. This may seem surprising, since it gets a lot of attention in the media, probably because of Donald Trump's notable Twitter habits and the many popular media feuds and tit-for-tat battles. Also interesting, Twitter use is actually decreasing in the United States. Seth Fiegerman for CNN describes the decline: (Note: Fiegerman, Seth. "Twitter is now losing users in the U.S." *CNN Tech*. July 27 2017. Web. July 10 2018.)

> Despite having the most powerful person in the world as a loyal user, Twitter (TWTR) failed to add any new monthly active users globally during the June [2017] quarter. Even worse, it's now losing users in the U.S.
>
> Twitter reported Thursday that its monthly user base in the U.S. declined to 68 million in the most recent quarter from 70 million in the previous quarter.

> Its global user base was 328 million, unchanged from the prior quarter. Analysts had been expecting Twitter to add at least a few million users.

Despite any decline or controversy, Twitter clearly remains a global social media player, and certainly has business communication application. In the following pages, we will look at the most common or major social media platforms in some detail, and work through their respective pros and cons.

LEARNING OUTCOMES

- Describe the primary use of Facebook
- Describe the primary use of Instagram
- Describe the primary use of Twitter
- Describe the primary use of YouTube

Facebook

Started in 2004, Mark Zuckerberg's Facebook is the largest social media platform in the world. With over two billion subscribers, Facebook has, arguably, every conceivable type of message and audience is within reach. However, it is important to note that younger generations are beginning to move away from Facebook, favoring platforms such as Instagram and Snapchat.

As is the case with all social media, Facebook primarily serves to connect people, which makes social media platforms ideal places for companies to connect with their customers in a way that feels personal.

PAMPERS

Everybody knows (or has heard) that having a baby is a lot of hard work, full of tough and unpleasant jobs such as changing diapers. However, babies are also pretty darn cute: just check out the social media feeds of any new parent. Instead of focusing on their product (diapers), Pampers instead focuses on the babies.

Whether you belong to a multi-billion dollar global company or a smaller tech startup, Facebook is clearly useful for a variety of organizations. As you watch the following video, note how vlogger Amy Landino recommends starting a Facebook marketing campaign.

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One of Facebook's greatest tools is its ability to share posts from other social media sites: you can share YouTube videos, you can set up your Instagram account so your posts are automatically cross-posted to Facebook, and you can link to any other site on the internet.

LEARN MORE

Check out this article, 8 companies doing social media right and what marketers can learn from them, on Marketing Land's website to see, as the title of the articles says, some companies who are doing social media right. In particular, check out the profile on Staples's use of Facebook.

There are, of course, downsides to using Facebook. As we mentioned earlier, younger individuals tend to skew away from Facebook, so you might not reach them on this platform. Additionally, many people have liked so many pages and have so many friends that your brand's posts may get lost in their news feed. Perhaps most critically,

Figure 2. Pampers Facebook page

In the “About” section of Facebook’s brand pages, Facebook provides stats on how responsive different brands are. You can see that Pampers uses Facebook as a place to engage with their customers and that they typically reply within a day (Figure 2). They also encourage engagement with their posts by inviting parents to share photos of themselves with their babies:

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If you scroll through the Pampers Facebook page, you can see parents interacting and sharing stories of their children, which boosts Pampers’s reach without Pampers putting in work beyond that initial post.

there have been recent concerns over Facebook’s misuse of data as well as its data security, so it’s possible the platform will make changes or that users may shift away.

PRACTICE QUESTION

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When considering Facebook for your business communications, you should consider the above parameters and adjust your approach accordingly. It’s probably worth arguing that your company should be on Facebook to some degree, but depending on your target market, and how you like to communicate, other venues might be better options. Also, as we mentioned, you can integrate other social media, especially YouTube and Twitter, into your Facebook efforts. In this sense, Facebook may be a hub for your social media activity, even if it’s not where most of your customers can be found.

Table 2. Pros and Cons of Facebook as a Social Media Platform

Pros	Cons
Massive audience	Concerns over misuse of data
Mature ad and messaging options	Younger demographics can find it passé
Various features and methods to create and disseminate communications	So much messaging may hide/weaken the uniqueness of your message

Instagram

Instagram entered the collective consciousness in 2010, bringing with it the application of filters to smartphone photographs. As smartphone use has grown, Instagram has seen its membership skyrocket and its company success take off, ultimately leading to their purchase by Facebook in 2012. That’s right, the third most popular social media platform for business use is owned by the number one platform.

Instagram allows people to take their ordinary smartphone photos and turn them into nostalgic or other-worldly looking high quality images.

DOMINO'S PIZZA

Even something as simple as a Domino's Pizza can look extraordinary on Instagram! As you look at the company's profile, you can pick out a few "best practices" for Instagram posting:

1. Try to post only once a day
2. Use relevant hashtags to make your posts easy to find
3. Invite people to comment in your captions

While businesses certainly use Instagram, the top users of Instagram tend to be individuals interested in creating a personal brand. The notion of a "personal brand" is a relatively new idea, augmented and now fully embedded into mass marketing by tools like Instagram. Here are the users of Instagram with the most followers according to Social Blade. Note the relationship here between celebrity and overall marketing.

The link between celebrity and advertising has been around a long time—just check out the ad in Figure 3 from 1915. Today's version of this is a Kardashian or The Rock hashtagging a product or posting a picture of themselves with a product. While consumers are well aware of celebrity endorsements, these product recommendations can seem more genuine coming from someone's Instagram account than if the celebrity is featured on a brand's own Instagram account.

Figure 3. A 1915 Newspaper Coca-Cola ad from the Morning Oregonian. Even over a century ago, celebrity endorsements were used to sell products.

SELENA GOMEZ

Selena Gomez's account has over 130 million followers. In the following article, note the controversy surrounding her taking a picture of herself drinking a Coke.

If you decide to use Instagram, the following video details its basic functions. Note the integration with Facebook given Facebook's ownership of Instagram.

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PRACTICE QUESTION

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When assessing the usefulness of Instagram, you should keep the pros and cons listed in Table 3 in mind:

Table 3. Pros and Cons of Instagram as a Social Media Platform

Pros	Cons
Ability to create multiple topic-based accounts	Image-based content can limit the type of message communicated
Excellent and easy integration with Facebook	Tends to attract a younger user base
Great design	Changing algorithms can change how often you should post

Twitter

For the ability to quickly and concisely reach an audience, Twitter is arguably the best social media option, perhaps even better than Facebook. While Twitter started with very limited features—essentially just the ability to post a 140-character message—it has grown as a platform as its use demanded more features. Messages are still limited in length (now 280 characters instead of the 140), but there are ways to get around this limitation, including the use of threads (which string multiple tweets together) and moments (which allow you to connect tweets together after they've been posted). Additionally, you can include images and videos in your tweets, which allows for a much wider variety in the messages you can communicate via Twitter.

JETBLUE AIRWAYS

JetBlue Airways has a Twitter presence that finds its niche between a corporate brand and a personal presence. If you scroll through JetBlue's Twitter feed, you'll find promotions for their events and sales. Perhaps JetBlue's biggest strength is their consistent and professional tone across all of their tweets.

> What's more fly than free new books? Give your favorite JetBlue city a chance to win $25,000 in children's books plus a reading room makeover for a local library or community organization from JetBlue For Good. https://t.co/0KcqocWykA #SoarWithReading #BookWithUs pic.twitter.com/AjxwaW18Jy
>
> — JetBlue Airways (@JetBlue) June 27, 2018

Not only does JetBlue have a consistent tone across their tweets, but they also have consistent (and on-brand) color palette. As we discussed in Module 5: Visual Media, consistent coloring can make your company presence and messaging more stable and recognizable. As you may have guessed, JetBlue has chosen blue as their primary color. As you scroll through their Twitter feed, you can see that almost every image has a predominantly blue color scheme.

Perhaps Twitter's largest strength is the way it allows users to quickly and concisely reach their audience. Despite the increase to 280 characters, tweets are still limited in their length and encourage users to send a focused message.

While the use of hashtags has transferred over to other social media platforms (primarily Instagram), hashtagging originated on Twitter, and it represents one of its key contributions to the social media world. By tagging your posts, you increase your potential audience because even individuals who don't follow you directly can follow the hashtag and see your tweet within it.

As is the case with Instagram, much of Twitter consists of personal accounts where people can accumulate several thousand—or even a million or more—followers. Despite the massive personal use of Twitter, the platform was originally created as a business tool. Thus, it's no surprise that companies also use Twitter. The largest organizational (non-individual) following is, ironically, YouTube, which uses its account to generate traffic back to YouTube. Twitter's own account, @twitter, is the second largest account, and CNN is third. Out of the top 20 accounts, these are the only three non-individual accounts. In many ways, Twitter and Instagram are similar: most content is simple promotional messaging designed to drive interest in a particular personal brand.

If you're unfamiliar with how to use Twitter, you can check out this Twitter onboarding guide on Wired. Perhaps the most important thing called out in the article is the importance of building a community. While making one's own tweets is probably the core activity on Twitter, following, retweeting, and hashtagging already-developed streams and ideas are equally important. For your business use, you should support and call out others' content as often as you post your own. This demonstrates support and balance and shows a genuine contribution to a body of ideas or streams of thought.

LEARN MORE

Check out this article from Lifewire, Retweet With a Comment on Twitter, which encourages manual retweeting, as doing so allows you to add your own content and voice while passing along the material of the original tweet.

When assessing the usefulness of Twitter, you should keep the pros and cons listed in Table 4 in mind:

Table 4. Pros and Cons of Twitter as a Social Media Platform

Pros	Cons
Simple and easy to use	Largely centered on personal brand promotion
Relatively large usage	More manual work to integrate with other social media platforms
Ability to link by theme with hashtags	Has so much content your message may get lost

PRACTICE QUESTION

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YouTube

Google purchased YouTube in 2005, and since then, it has grown to be the second largest social media platform (in terms of regular users). Interestingly, the line between Facebook and YouTube is often blurred, despite the fact that they are owned and operated by separate entities. Many people use both platforms and link content between the two. Much of Facebook's content consists of posted videos embedded or linked from YouTube.

While we may broadly consider YouTube to be the second largest social media platform, it operates in a fundamentally different way from most social media platforms. It does not necessarily directly compete with Facebook, Twitter, or Instagram since these platforms have many features focused on messaging, whereas YouTube focuses on uploaded videos, usually limited in length, and comments on said videos. Because of this, it's usually best to cross-post your videos from YouTube on a different platform and start discussions and conversations on other platforms (e.g., Facebook or Twitter).

Most videos on YouTube are around 5–10 minutes long, with a default limit at 15 minutes; however, you can increase this limit by verifying your account. YouTube users may comment on videos and exchange links to other content elsewhere on the web. Additionally, users may create channels and "areas" of content ascribed to certain brands or authorship. In this sense, YouTube is an excellent way to grow a brand essentially for free.

REI

REI, an outdoor recreation retailer, uses YouTube to great effect. On the home tab of REI's YouTube channel (Figure 4), they provide a link to shop at their store, as well as links to their other social media presences. Additionally, they have featured videos, highlighting their promoted videos.

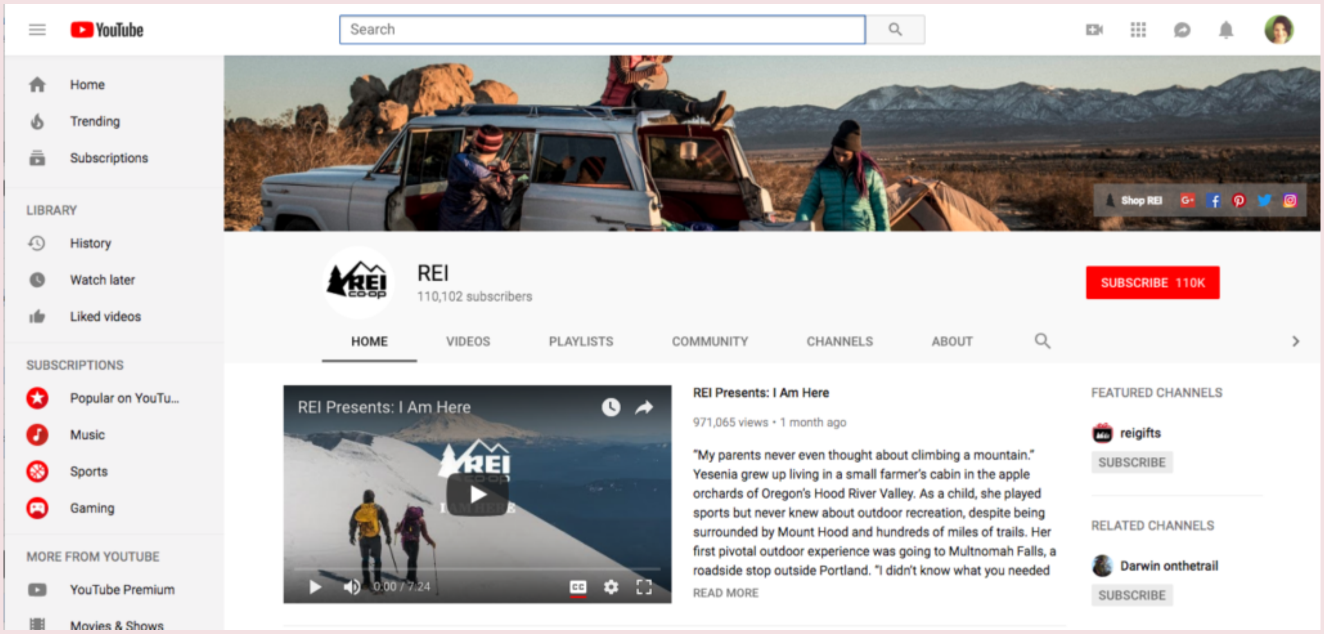

Figure 4. REI's Home on YouTube

As you look through their video library, you can see that they have several categories of videos, including REI Presents, REI Camping Recipes, REI: Trailheads, and REI. They use these different channels to appeal to people with different interests within their outdoor niche.

They specifically use their REI Presents videos to tell stories of people who have accomplished outdoor feats and to inspire others.

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Using YouTube

The following video (on YouTube!), discusses how to place videos on YouTube. Note the author's emphasis on how describing and placing the video will help grow its audience and overall viewership.

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YouTube is an excellent platform to place content, but it arguably is not a good choice for creating discussions around the content. In this way, Facebook—or another sharing platform—should be combined with YouTube. You can embed YouTube videos directly into your website as well, which optimizes YouTube's versatility. However, another thing to keep in mind is that, like Facebook, Google harvests data from its users and sells it to advertisers and other marketing firms.

When assessing the usefulness of YouTube, you should keep the pros and cons listed in Table 5 in mind:

Table 5. Pros and Cons of YouTube as a Social Media Platform

Pros	Cons
Ease of use	Data capturing and privacy concerns
Integration with other social media and websites	Sheer size and volume of content requires careful placement
Massive audience	Creating videos requires unique skill and tools when compared to business writing

PRACTICE QUESTION

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ADDITIONAL SOCIAL MEDIA PLATFORMS

What you'll learn to do: Identify social media platforms that are typically less frequently used by businesses

What we may consider to be a "second tier" of social media platforms are LinkedIn, Pinterest, Snapchat, and Google Plus. While these platforms have similar social media function as the "first" tier or most common platforms, they all have a more niche audience, which means they have less market share.

As with the more common platforms, these platforms all attempt to . . .

1. Bring services or products to market and increase awareness.
2. Engage customers, often with respect to service issues or problems.
3. Encourage a "buzz" or interest around a company and its product(s) or service(s).

LEARNING OUTCOMES

- Describe the primary use of LinkedIn
- Describe the primary use of Pinterest
- Describe the primary use of SnapChat
- Describe the primary use of Google Plus

LinkedIn

Launched in 2003, LinkedIn focuses on recruiting and finding talent. Their initial slogan was, "LinkedIn makes your professional network faster and more powerful." Individual users build profiles similar to a personal resume and are able to search for new jobs. Most importantly, users make connections with each other and build their professional networks.

LinkedIn builds networks through an algorithm that recommends connections to users. For example, if someone you don't know is connected with several of your connections, LinkedIn will suggest that you connect with that person yourself. People with whom you have a direct connection are your first-degree connections. People connected to your first-degree connections are your second-degree connections and so on. By looking at the networks of your connections—and by letting the algorithm work for you—you expand your own network, connecting with people who might give you a job, fill a job opening you have, or become a client or customer.

In Module 14: Finding a Job, we'll talk more about the importance of networking and strategies to build your network. For now, we'll simply focus on LinkedIn and its features.

As of early 2018, over 500 million people use LinkedIn, and there are typically around 3 million open job postings or listings on the site (Note: Aslam, Salman. "Linkedin by the Numbers: Stats, Demographics & Fun Facts." *Omnicore*. 1 Jan 2018. Web. 10 July 2018.).

PRACTICE QUESTION

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LEARN MORE

You can check out this detailed article to get started with Linkedin. The article also includes links to higher-level and more advanced techniques, many of which are useful for recruiters.

The most important part of LinkedIn for business communication is recruiting talent or finding jobs; after all, that's why people build a network. Let's take a look at both actions.

Recruiting Talent

If you are recruiting, LinkedIn can be a powerful platform for finding candidates to fill openings at your company. However, unless you have a premium account, you can only reach out to people who are already a part of your LinkedIn network. Here are a few quick and easy strategies for recruiting on LinkedIn:

- While people can be hesitant to connect with someone they don't know, if you find a candidate who looks perfect, you can send them a request to connect along with a message explaining the position you think they might be right for.
- If you and the potential candidate share a second or third level connection, you can ask that connection to make an introduction.
- If you're doing a lot of recruiting, it might be worthwhile to get a premium account and message individuals directly.

Finding Jobs

As an individual user on LinkedIn, you can view top jobs recommended for you based on your profile (Figure 1).

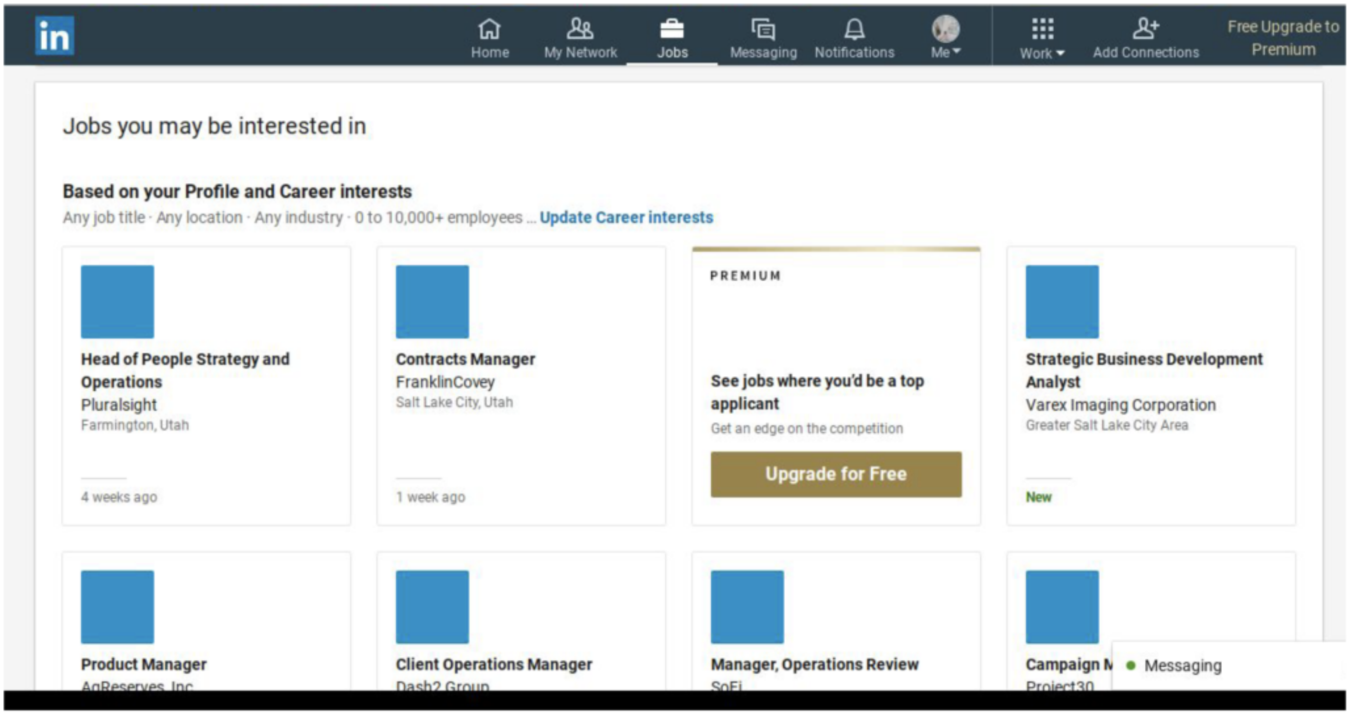

Figure 1. LinkedIn provides "Jobs you may be interested in" based on your profile.

If you click on any of the opportunities listed, you'll be taken us to the job posting's specific page. There you will find the full job description and can apply or interact with the recruiter directly. Some job postings will have an Apply button, which will typically direct you to the company's site to apply; others will have a LinkedIn Easy-Apply button, which will use the information you've provided in your LinkedIn account to let you apply in about 5 seconds.

While LinkedIn's usage is high, the content is often criticized for being overly corporate and somewhat lacking in meaningful exchange. Often people make connections with strangers (or attempt to) or make connections with friends and family who have never interacted with them on a professional basis—all in the name of having a larger network.

LEARN MORE

This article from *The Guardian* describes some issues with LinkedIn; in it, the author notes how the platform is unquestionably helpful in finding new opportunities, but the emphasis on presenting a perfect resume or background can water down the overall content.

When assessing the usefulness of LinkedIn, you should keep the pros and cons listed in Table 1 in mind:

Table 1. Pros and Cons of LinkedIn as a Social Media Platform

Pros	Cons
Excellent for job postings or job searches	Maybe watered-down content (i.e., resumes with exaggerated self-promotion)
Widespread corporate use	Has an exclusive business focus, limiting the type of content you should share
Helpful in constructing and maintaining your resume	Has a limited user base, limiting your reach to potential customers

Pinterest

Pinterest is an excellent platform for viewing and disseminating content organized visually by theme. Users can search for things like "social media in marketing" or "fun things to do in Salt Lake City," and then "pin" things to their own boards. Users can create their own boards, which are essentially folders of content. These boards can either be marked as private or public.

For example, a user planning a surprise birthday party might mark the board as private so her friend (whom she may be connected with on Pinterest) can't see her planning.

LEARN MORE

Check out this article on the basics of using Pinterest, which is arguably one of the simpler and easy to learn platforms.

As of early 2018, Omnicore found the following statistics on Pinterest's user base (Note: Aslam, Salman. "Pinterest by the Numbers: Stats, Demographics & Fun Facts." *Omnicore.* 1 Jan 2018. Web. 10 July 2018.):

- 81% of users are female
- 87% of users have purchased a product seen on a pin
- 93% of users use Pinterest to plan a purchase

Using Pinterest

While businesses are more likely to place ads on Pinterest than to create Pinterest accounts for themselves, there is an interesting strategy some businesses use.

The following video (below) from 2015 details how Pinterest is useful for referral traffic; this is traffic that would start with or on Pinterest, then lead to going to a second website for service, products or more information. In the video, the author talks about how Pinterest is useful as a "digital catalog," where people can save things they see on the web, either because they've "become inspired by" these things or otherwise find them interesting.

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When assessing the usefulness of Pinterest, you should keep the pros and cons listed in Table 2 in mind:

Table 2. Pros and Cons of Pinterest as a Social Media Platform

Pros	Cons
Easy and simple to use	Limited, gendered audience; super-majority are women
Referral generation	Perceived usage is based around ideas or DIY projects instead of products
Can view content without commenting or forwarding	The interface is comparatively confusing and difficult to navigate

PRACTICE QUESTION

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Snapchat

Snapchat started in 2011 and has over 180 million daily users. It is primarily used for creating multimedia messages referred to as "snaps." Snaps can consist of a photo or a short video and can be edited to include filters and effects, text captions, and drawings. The ability to send video snaps was added as a feature option in December 2012. By holding down on the photo button while inside the app, a video of up to 60 seconds in length can be captured. After a single viewing, the video disappears by default. Spiegel (the company that owns the app) explained that this process allowed the video data to be compressed into the size of a photo. On May 1, 2014, the ability to communicate via video chat was added. Direct messaging features were also included in the update, allowing users to send ephemeral text messages to friends and family while saving any needed information by clicking on it.

Oriented largely toward Millennials and Generation Z, Snapchat's more secure sharing features continue to resonate with many users. The sort of "anti-Facebook" vibe of the early days of the company seemed to culminate in 2014 when their owners resisted a sale of the company to Facebook: (Note: Colao, J.J. "The Inside Story Of Snapchat: The World's Hottest App Or A $3 Billion Disappearing Act?" *Forbes*. 6 Jan 2014. Web. 10 July 2018.)

> Snapchat represents the greatest existential threat yet to the Facebook juggernaut. Today's teens have finally learned the lesson their older siblings failed to grasp: What you post on social media—the good, the bad, the inappropriate—stays there forever. And so they've been signing up for Snapchat, with its *Mission: Impossible* style detonation technology, in droves. FORBES estimates that 50 million people currently use Snapchat. Median age: 18. Facebook, meanwhile, has admittedly seen a decline among teenagers. Its average user is closer to 40.

PRACTICE QUESTION

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Given the limited demographics on Snapchat, its business use is probably most effective for companies targeting Millennials and Generation Z. On Snapchat, companies often form their marketing messaging into the stories and snaps that Snapchat offers. If consumers are on Snapchat and follow or make themselves available to various organizations, those organizations can message their following directly, similar to other social media. You can learn more about Snapchat for business here.

Interestingly, Snapchat marketing appears to be more effective than other common platforms: (Note: Parker, Sydney. "Snapchat for Business: A Guide for Marketers." *Hootsuite*. 11 Oct 2017. Web. 10 July 2018.)

> Snapchat collaborated with MediaScience to survey 320 consumers aged 16 to 56, which compared, during 552 sessions, Snapchat video ads to those on TV, Facebook, Instagram, and YouTube. The study tested emotional responses, eye-tracking, and exit surveys.

> Snapchat says its ads garnered twice the visual attention of Facebook and 1.5 times more than Instagram. They were also 1.3 times more effective than YouTube. When compared to those platforms and TV, Snapchat claims that its ads generated greater emotional response and twice as much intent to purchase.

The blog post argues that Snapchat does two things very well:

1. 10 second Snap Ads (short, to the point, not too long to distract or lose an audience)
2. Snap filters which can overlay a brand message or promotion on top of a message or story

Despite these successes, the integration of advertising into Snapchat is somewhat controversial. There's at least some evidence that early adopters of the platform wanted an ad-free messaging experience. (Though, as some pay point out, almost all platforms or apps that are "free" to download and use rely on an advertising model to maintain and grow their business.)

When assessing the usefulness of Snapchat, you should keep the pros and cons listed in Table 3 in mind:

Table 3. Pros and Cons of Snapchat as a Social Media Platform

Pros	Cons
Excellent for targeting Millennials and Generation Zs	Maybe too generational; most users are <34 years old
Appears to be more effective than other social media	Some users view advertising on Snapchat as intrusive and detrimental to their experience
Some better security features	Limitations on the kind of messages shared (video length, etc.)

Google Plus

Google Plus (also written as Google+) is Google's answer to Facebook. Using very similar features, Google Plus integrates (naturally) very well into other Google services, especially YouTube. While it never caught on the way Facebook has—its usage is relatively low at 111 million versus Facebook's 2.07 billion—it has elegant tools, many of which could be used for various business-communication purposes.

Perhaps the most useful feature of Google Plus is the Communities tool. This tool brings users together around a given theme, such as, "home education in California," and then allows people to connect and interact around that theme. It is similar to Facebook's Groups feature.

This video provides some additional guidance on how to use Google Plus

When assessing the usefulness of Google Plus, you should keep the pros and cons listed in Table 4 in mind:

Table 4. Pros and Cons of Google Plus as a Social Media Platform

Pros	Cons
Potential for large audience (integration with other Google services)	Never caught on like Facebook; relatively low usage
Local search engine optimization (SEO)	More manual work to integrate with other social media platforms (minus YouTube)

PRACTICE QUESTION

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SELLING YOUR PRODUCTS

What you'll learn to do: Use various types of social media to increase your sales

Recall that our goal with social media use is a positive exchange with customers around a product or service. We use social media to reach a wide audience inexpensively. This audience is both internal—our own company or organization—and external—our customers and sometimes even our vendors. Depending on your organization's leadership, some might argue that internal communications, and getting these right, can be just as important as interaction and messaging with clients and vendors. The area of overlap between business communication and marketing, particularly with social media use, is gray.

In the following pages, we will look at contextual use of social media and place it in our framework for social media use below:

1. To bring services or products to market; increase awareness.
2. To engage customers, often with respect to service issues or problems.
3. To encourage a "buzz" or interest around a company and its product(s) or service(s).

LEARNING OUTCOMES

- Use social media to announce a product launch
- Use social media to spotlight products
- Use social media to announce a sale or event

Product Launch

A key reason businesses use social media is to bring attention to a new product or service.Using social media for this purpose is inexpensive, and companies can usually reach a large audience immediately. Using social media prior to a product's launch can help generate excitement for the upcoming product and get the attention of potential new customers.

Canva, a social media marketing blog, describes various tactics when announcing a product or service launch. Here are a few notable items from the list: (Note: Jose, Maria. "10 tactics for launching on social media and generating buzz, inspired by companies who've done it." *Canva*. Web. 15 July 2018.)

- **Design a hashtag.** By using a hashtag, you can create a central "hub" for all posts about your new product. People posting about the product can also use this hashtag, which increases the reach of the product.
- **Organize a countdown.** Countdowns can increase interest over a period of time. As you release messages on a schedule, it gives more people the opportunity to get excited and ready for the product by the time it is released.
- **Develop consistency across platforms.** The look and feel of a Facebook post should be roughly similar to something on Pinterest or Snapchat. While this is important across all social media messaging, it's particularly important when launching something new. If your messaging is inconsistent, people might get confused about what exactly is being released.
- **Have a clear call to action.** As with good web design, a social media message should be easy to interpret. You want your audience to have all the information they need to either further interact with your social media campaign or have the information they need to get your product.

MANGO

Let's take a look at this tweet from Kendall Jenner on behalf of Mango (a fashion company):

> Countdown starts for @liuwenlw starring in the next @Mango campaign! #MangoGirls enjoy! pic.twitter.com/tq6tG5ZCjD
>
> — Kendall (@KendallJenner) February 18, 2016

Mango is doing a few things in this tweet to gain interest before launching a new product. By using a countdown, they're growing interest (and providing a bit of mystery), so when the product launches, they'll already have interested customers. They're also using Kendall Jenner as a spokesperson to gain interest in their upcoming product. Kendall Jenner likely has a lot more followers than Mango, so she is able to get the company's message out to more people. Additionally, her endorsement makes people more likely to be interested in the product once it launches.

When choosing which social media platform(s) to use for a product or service launch, you should consider the target audience and type of message. Assuming an organization has the capacity to manage a large social media portfolio, announcements of product or service launches should go out on as many appropriate platforms as possible. Some consideration should be given to "spamming" your audience, however, as well as thinking through any "niche" sensibilities around a given platform. Table 1 outlines some items along these lines:

Table 1. Comparing Social Media Platforms			
Platform	Niche?	Mass messaging off-putting?	Other considerations?
Facebook	No	No	Has the largest user base and as such, should be everyone's top focus; if you can only manage one platform for social media, it should be Facebook.
Instagram	Somewhat	Somewhat	Overly self-promoting may appear disingenuous.
Twitter	No	Somewhat	Limited to 280 characters; can use hashtag promotion.
YouTube	No	No	Usually must link to another platform to reach wide audience.
LinkedIn	Somewhat	Yes	Limit blatant company promotion; try to focus on recruiting or sharing job opportunities.
Pinterest	Somewhat	No	Consider the gender statistics when crafting a message.
Snapchat	Somewhat	Somewhat	Consider the generational statistics when crafting message.
Google Plus	No	No	The platform has a comparatively small user base

PRACTICE QUESTION

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Spotlight Products

Many of the themes covered in the recent pages are similar: we work to use real, compelling, and authentic narratives to promote interest in our organization or a given product or service, or to increase interaction with and between customers.

The key questions to consider:

1. Is the message or post authentic?
2. How easy have they made it to interact?

NETFLIX

In Figure 1, Netflix leverages their data analytics for viewership to make a tongue-in-cheek exchange:

> To the 53 people who've watched A Christmas Prince every day for the past 18 days: Who hurt you?
> — Netflix US (@netflix) December 11, 2017

Note that this single tweet was liked over 450k times, and retweeted/shared over 115k times! This Tempesta Media blog post here, discusses using humor to drive social media interest. Humor is an effective way to reveal the "story" of your brand, or in other words, the human side of your business.

Netflix also takes advantage of multimedia in this tweet spotlighting their new Facebook service, Recomoji, which sends users recommendations based on the emjois you send.

> We took "What Are You In The Mood To Watch?" a little too seriously. Try it now: https://t.co/PFvjwfRl0W pic.twitter.com/upBY46TEI9
>
> — Netflix US (@netflix) July 17, 2018

KOHL'S

Another good example is Kohls' Instagram feed. In their feed, they highlight outfits of the day (using the #ootd hashtag to up their visibility by non-followers). Not only do they put together a cute look using items that can be found in their stores, but they also use these posts to highlight savings available in stores.

View this post on Instagram

Oh hi, new favorite #ootd. ?? Save 15% on it through 7/22 + earn $10 Kohl's Cash for every $50 spent through 7/22. (Redeem 7/23-29.)

A post shared by Kohl's (@kohls) on

Jul 19, 2018 at 8:34am PDT

Beyond their #ootd posts and other product posts, Kohl's spotlights customers and looks that their customers have purchased at the store, giving followers someone to relate to.

Recall that "the human side" of the business was something recommended in one of our previous pages on authenticity. In years past, advertisers used to argue that a brand should create a fictional "perfect" image. The famous Marlboro Man suggested that those who smoked Marlboro would take on the tough and macho air of the man himself.

The compelling story was not necessarily about being authentic but rather about being delivered from (maybe) a dreary life into something exciting and adventurous. But the Marlboro Man is not subtle or real enough for today's wiser, media-saturated consumers. They want reality but expressed in engaging and fun ways; in short, they want humor.

The most effective tweets play on a simple and authentic interaction around core pieces of a company's brand.

PRACTICE QUESTION

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Sales and Events

Advertising a Sale

Considerations for announcing a sale or event are similar to announcing new products or services. You want to create interest and excitement around the sale. You can do this by either spotlighting the size of the sale or savings, or highlighting the reason for the sale: for example, you can highlight a big fifty percent off blow-out sale or you can highlight back-to-school savings.

Of course, these aren't the only types of sales, but these are the typical ways you would frame a sale.

PATAGONIA

Perhaps one of the biggest sales of the year is any company's Black Friday sale. Sales have begun starting earlier and earlier (with some "Black Friday Sales" starting over a week before Thanksgiving) as companies attempt to outdo each other in this sales space every year. In 2016, Patagonia, an outdoor clothing store, pledged to donate all sales made on Black Friday to environmental groups:

> This Black Friday we're donating 100% of sales to grassroots environmental groups. #LoveOurPlanet: https://t.co/6NgxQit5SJ pic.twitter.com/fK8TNCAjdB
>
> — Patagonia (@patagonia) November 21, 2016

This tweet emphasizes that while they're donating 100% during their Black Friday event, they also donate 1% of their daily revenue every other day of the year. Since their target customer base is made up of people who enjoy outdoor activities (and thus typically want to help preserve the environment), this tactic proved very successful for Patagonia.

That Black Friday, they brought in $10 million in sales (five times their expected revenue of $2 million), and they did, in fact donate all the proceeds. (Note: Kavilanz, Parjia. "Patagonia's Black Friday sales hit $10 million -- and will donate it all." *CNN Tech*. 29 Nov 2016. Web. 10 July 218.)

PRACTICE QUESTION

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Features to Increase Sales

There are, however, some unique features of various platforms that can help promote a sale or event. One such key feature is embedding a "buy" or similar button or link in a social media message. While some platforms, most notably Facebook, have actually killed its buy button, Pinterest's is alive and well.

- These buttons or links make it easy to buy right from your social channels
- Consider "pro" or paid accounts where you can link a buy button or feature into your post

Pinterest has a tutorial for building "buyable pins" here. The process is relatively simple, and it's worthwhile to emphasize the ease of Pinterest's platform. From their website: (Note: https://business.pinterest.com/en/getting-started-with-buyable-pins)

> To create a Buyable Pin from scratch, just follow the standard Pin creation process. As long as the Pin's URL points to a product detail page at your online store, the Pin will activate as a Buyable Pin.

Interestingly, buy buttons are somewhat controversial and haven't necessarily been successful on all social media platforms: (Note: Malone, Matt. "What Are Social Buy Buttons?" *Gravitate Design*. 10 Apr 2017. Web. 10 July 2018.)

> A study by the University of Massachusetts Dartmouth reported that only 35% of millennials were likely to use buy buttons on Facebook and just 24% were likely to use buy buttons on Twitter. As of now [March 2017] both Facebook and Twitter have decided to drop social buy buttons altogether.

Assuming your audience has a Millennial or Generation Z component, and especially if that also cross-references to a female audience, using Pinterest's and Snapchat's buy features is probably a wise move. Snapchat's percentage in the above graphic is small, but this data was taken in 2016. In a more recent 2018 article on prominent social media watcher Mashable, they argue that Snapchat's brand and buy filters are that platform's strongest feature: (Note: Bell, Karissa. "Snapchat just proved why lenses are a bigger deal than Stories." *Mashable*. 18 Apr 2018. Web. 10 July 2018.)

> [Snapchat] launched a new form of branded lenses called "shoppable" lenses . . . , which allow brands to apply buy buttons and prompts to install ads directly into a lens. Think of it as Snapchat's version of Instagram's "buy now" ads.

BUILDING YOUR BRAND

What you'll learn to do: Use various types of social media to build affinity with your customers and make your brand stand out

Social media can also be used to cultivate deeper brand and customer loyalty. In this sense, customers can, in a way, become part of the very organizations and companies that sell them goods and services. This is a relatively new phenomenon in market capitalism—it requires deeper study to understand if more fully—but for our purposes here, we hone in on three examples of community and deeper integration of customers into your organization.

Even for this new kind of engagement, we can stay within the social media framework introduced at the beginning of the module:

1. To bring services or products to market; that is, increase awareness.
2. To engage customers; often with respect to service issues or problems.
3. To encourage a "buzz" or interest around a company, its product(s) or service(s).

LEARNING OUTCOMES

- Use social media to cultivate community
- Use social media to create a sense of affinity
- Use social media to announce company news

Cultivate Community

In the previous section, we discussed ways to integrate customers into company business related to products and sales. In this section, we'll talk about engaging customers with the brand itself. Something like a change in ownership or leadership could be expressed in a simple announcement on social media and then forwarded and propagated by your own customers. Very brand-loyal customers blur the line between internal and external people; in some ways, your own customers could "work" for you via social media.

We may call this type of interaction—the energetic interaction between people about your brand or organization—a type of community. Social media cultivates this clearly and does it in often very inexpensive ways.

This issue of authenticity in social media is a challenging one. Think back to our discussion earlier about LinkedIn, where we critiqued the exchanges there as often hollow and exaggerated. Commensurate with it being largely focused on job and opportunity finding, the interaction there seems corporate rather than personal. While the

Guardian article titled "LinkedIn is the worst of social media. Should I delete my account?" may be excessive, the article does show the pitfalls of potentially inauthentic social media use.

While other platforms better lend themselves to building a sense of community among your customer base, it is important that you are transparent with your messaging as well. Customers (especially younger customers) are pretty savvy when it comes to social media and will notice if you aren't consistent in your messages and actions.

PRACTICE QUESTION

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Regardless of the tension here, certainly the goal of having more meaningful exchanges on social media is worth thinking about, and striving for. If we use a guide from a collection of thought, perhaps that will make our online interactions more real and meaningful.

DOVE

Over the last several years, Dove has worked to build a community around its brand of self-empowered women. In fact, according to its Twitter bio, "Dove is committed to helping all women realize their personal beauty potential by creating products that deliver real care." (Note: https://twitter.com/Dove)

This mission can be seen across Dove's various social media platforms, Facebook, Twitter, Instagram, and YouTube. In fact, the three of those platforms that have banner images (Facebook, Twitter, and YouTube) all have the same banner image (as seen in their Facebook page in Figure 1).

LEARN MORE

- 7 Habits to Make Your Brand Authentic on Social Media
- How to Build a Social Community: 4 Tips
- 4 Ways to Cultivate a Community For Your Brand

Create a Sense of Affinity

We define *affinity* as "taking a liking to something, often naturally or spontaneously." Because of the value social media-savvy consumers place on authenticity, contriving something intended to appear "natural" without it actually occurring naturally will be problematic. Nevertheless, creating compelling interactions over social media can certainly attempt and aim at a degree of authenticity that would create affinity for a brand, organization, product, or service.

Related to the concepts of affinity and authenticity is the creation of a narrative or story. This represents a line into marketing, from which we may borrow concepts for use in business communications. Here we leverage the idea of creating a story and narrative in order to gain a type of relationship (affinity) with customers. As discussed before, customers may be internal or external.

- Affinity is taking a spontaneous liking to something.
- Authenticity is a natural "realness" that isn't contrived or fabricated.
- A story or narrative is a compelling description around a person, brand or organization.

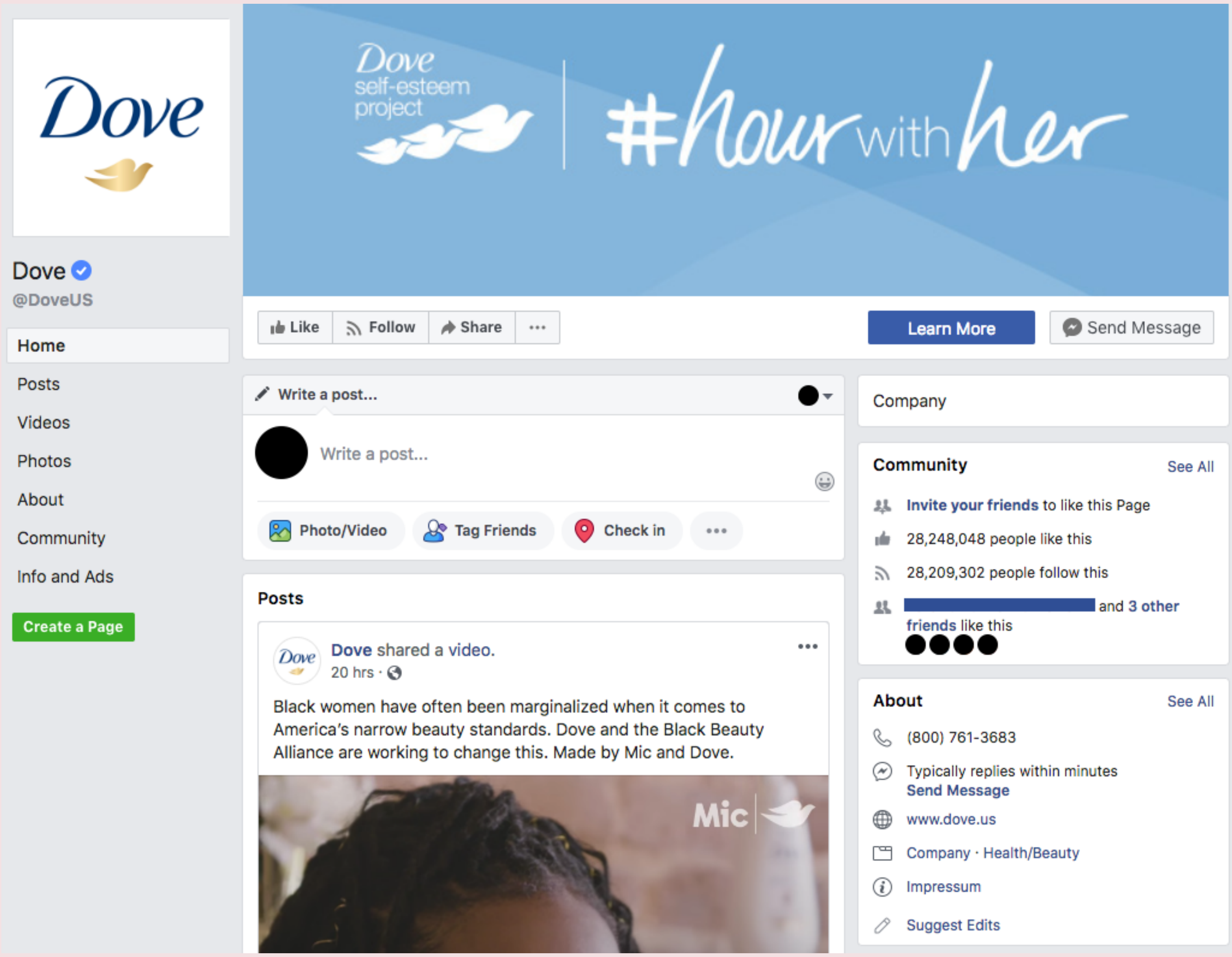

Figure 1. Dove's Hour with Her campaign is highlighted across all of Dove's social media, building their community of women.

We may consider that in order for a person (a customer) to gain an affinity for your brand or organization, you must create an authentic narrative.

PEACTICE QUESTION

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In this 2016 *Harvard Business Review* blog post, Ty Montague unpacks what he calls "storytelling" versus "story-doing" organizations. Storytelling organizations describe a great story and even attempt to use that story to energize their customers, but they do not follow through on their own stated values. Story-doing companies, however, both tell a great story and then demonstrate their aligned action. In short, we see that a compelling narrative must be true. There can be no "say-do gap." While this may seem like common sense, Montague found that of 42 studied publicly traded companies, storytelling companies outnumber storydoing companies 5 to 1.

LEARN MORE

Read this article on Sujan Patel's marketing blog: 7 Companies That are Killing It with Brand-Driven Storytelling

STARBUCKS

Starbucks is the first store that comes to mind when people think about national coffee shop chains—after all, there are over 13,000 locations in the United States alone. In fact, in some cities, you can be within walking distance of 30 different Starbucks locations at once.

Starbucks (like any large organization) is often viewed as a large corporation taking away business from its smaller competitors or taking away the identity and character of smaller towns it moves into. As we mentioned earlier, there's no way to change perception without actions, so Starbucks is taking action to show its dedication to social improvement. In fact, if you visit their website, one of the main sections along their top menu is Social Impact, right alongside their lists of coffee, tea, and menu items.

In 2018, as a part of their social mission, Starbucks announced a change in the way they deliver their drinks: they will use cups made from all recyclable material and stop using plastic straws by 2020:

> We're removing plastic straws in our stores globally by 2020—reducing more than 1 billion plastic straws per year from our stores.
>
> — Starbucks Coffee (@Starbucks) July 9, 2018

If you read through the comments, you can see Starbucks replying to concerns about not having a straw option, letting customers know that there will be straws available for those who need them but that the straws will be made of alternative materials. Starbucks also recently announced their first US Signing Store on Twitter:

> Coming this fall in Washington, D.C.: our first U.S. Signing Store, creating jobs and driving greater connection with the Deaf and hard of hearing community: https://t.co/aOWJKErx35 pic.twitter.com/39N0HuIGVL
>
> — Starbucks Coffee (@Starbucks) July 19, 2018

If you watch the video in the tweet, the video has captions—indicating there is no audio—as well as video description for those who are visually impaired. With this tweet, Starbucks shows that it's willing to take the time to ensure all their customers are welcome, regardless of their physical abilities.

Company News

So far, we have focused on external customers, but social media is clearly useful for internal customers as well. A change in senior leadership, ownership, or other large non-product- or service-oriented announcement, might be best made over social media. In doing company business like this, organizations "cross a divide" between external and internal customers and integrate everyone into an audience interested in the customer experience.

Daniel Newman, writing for *Forbes* here, describes this as an "Integrated Customer Service Model." In this model, customers themselves drive company interaction, and in so doing, they integrate into company business. Loyal customers, particularly ones that drive interest in your brand, may talk about company items on their own social media.

PRACTICE QUESTION

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https://courses.lumenlearning.com/wmopen-businesscommunicationmgrs/?p=5490

UBER

One example of announcing big company change is Uber's management crisis in 2017-18. To try to temper a variety of issues that Uber's former CEO and founder, Travis Kalanick presided over, their new CEO, Dara Khosrowshahi released a variety of videos and messages suggesting great change, better pay and respect for drivers, and other efforts to improve the Uber experience. A few examples are below:

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A YouTube element has been excluded from this version of the text. You can view it online here: https://courses.lumenlearning.com/wmopen-businesscommunicationmgrs/?p=5490

In the first video, note Khosrowshahi's efforts to be approachable, human, and down to earth. While answering how he liked being an Uber driver for a day, he described how difficult it was to drive in San Francisco. "It's wigging me out a bit . . . oh I missed my turn again!"

Some have critiqued the effort as being disingenuous and contrived while others see it as a very reasonable move to convince customers and drivers that Uber is improving. What's your sense about it? Were these videos hollow and contrived or a good faith effort to express company improvement?

PUTTING IT TOGETHER: SOCIAL MEDIA

In this module, we explored how social media is a relatively inexpensive and efficient way to express your organization's communications. Usually these platforms are for marketing, but they can also be useful for internal communications.

Social media is used to accomplish each of the following:

1. Bring services or products to market; that is, increase awareness.
2. Engage customers; often with respect to service issues or problems.
3. Encourage a "buzz" or interest around a company, its product(s) or service(s).

The top tier of social media consists of Facebook, Instagram, Twitter, and YouTube; these are the most diverse platforms with the most widespread use. The second tier is LinkedIn, Pinterest, Snapchat, and Google Plus. These are a bit more niche or limited in their reach or options.

The following video is an excellent summary of this module's content. Note how the video company uses it to promote their own services. All of this is on YouTube and integrated with their website, Facebook page and other media.

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MODULE 11: COMMUNICATING DIFFERENT MESSAGES

WHY IT MATTERS: COMMUNICATING DIFFERENT MESSAGES

Why learn to effectively communicate different messages?

How would it feel if you found out your job had been eliminated due to cost-cutting measures? How about if this news was **not** delivered in a one-on-one or small-group meeting with your manager but instead in the form of a general email addressed to the entire division? This actually happened in 2006 when Radio Shack laid off roughly 600 employees in this manner.

In addition to consequences to the business, there is a personal element at play here. Your written communication skills are critical to your success and advancement in today's business environment. It is important not just to get your point across to your audience but also to do so using the right tone, structure and media to ensure that your message is well received. According to David Grossman, companies lose an average of $62.4 million per year due to either lack of communication or poor communication. (Note: David Grossman, "The Cost of Poor Communications," The Holmes Report, July 17, 2011.)

Business communication can be thought of as a problem-solving activity in which individuals may address the following questions:

- What is the situation?
- What are some possible communication strategies?
- What is the best course of action?
- What is the best way to design the chosen message?
- What is the best way to deliver the message?

In this module, we will examine this problem-solving process and help you learn to apply it in situations such as writing basic informative messages, team-building messages, critical messages. We will also examine responding professionally to critical messages.

INFORMATIVE BUSINESS MESSAGES

What you'll learn to do: Identify the appropriate use of informative business messages and write an informative business message.

Informative messages are the backbone of business communication. In this section, we will cover short informative messages using a variety of techniques. We will also explore how to write long informative messages and use appropriate communication channels.

LEARNING OUTCOMES

- Discuss the purpose and use cases of informative messages in a business context
- Write a short informative message
- Write a long informative message

What is an Informative Message?

Most business communications are in fact "informative" messages. An informative message in the workplace is simply the sharing of meaningful information between people in an unbiased and professional manner. Informative messages can be short or long, formal or casual in tone, internal or external in focus, and direct or indirect in structure, depending on the situation. Like all forms of communication, the purpose of informative messages is to promote understanding, encourage action, stimulate thinking, or promote ideas.

Since informative messages are so prevalent in business communication, there are too many examples and use cases to mention in this brief module. Simple, informative messages can be used to let employees know of an upcoming IT system maintenance, a new break room cleanliness policy, or a new all-hands meeting time. They can be used to announce a significant company win over a competitor, a new product launch delay, or the creation of a new division within the company. As the subject becomes more important and complex, informative messages can enlighten employees about quarterly financial results, acquisitions, and plans to take the company public.

Informative messages can take on almost any form of electronic communication: IMs, chats, emails, presentations, memos, blogs, podcasts, press releases, and reports. As was stated earlier in this module, the situation at hand will dictate how the message is crafted and how it is sent. Despite the variety of informative messages and how they can be sent, there are some guidelines that pertain to all effective business communication.

1. Get to the main idea as quickly as possible.
2. Use a greeting to identify the audience.
3. Be clear and concise with the presentation of information.
4. Check your message for grammatical errors.
5. Include a call to action.

PRACTICE QUESTIONS

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Short Informative Messages

Short, informative messages can take a variety of forms. For example, a quick communication to a teammate can utilize IM technology and provide a vehicle for a quick response. These messages tend to be more conversational in structure and resemble a chat more than an email or other document (Figure 1).

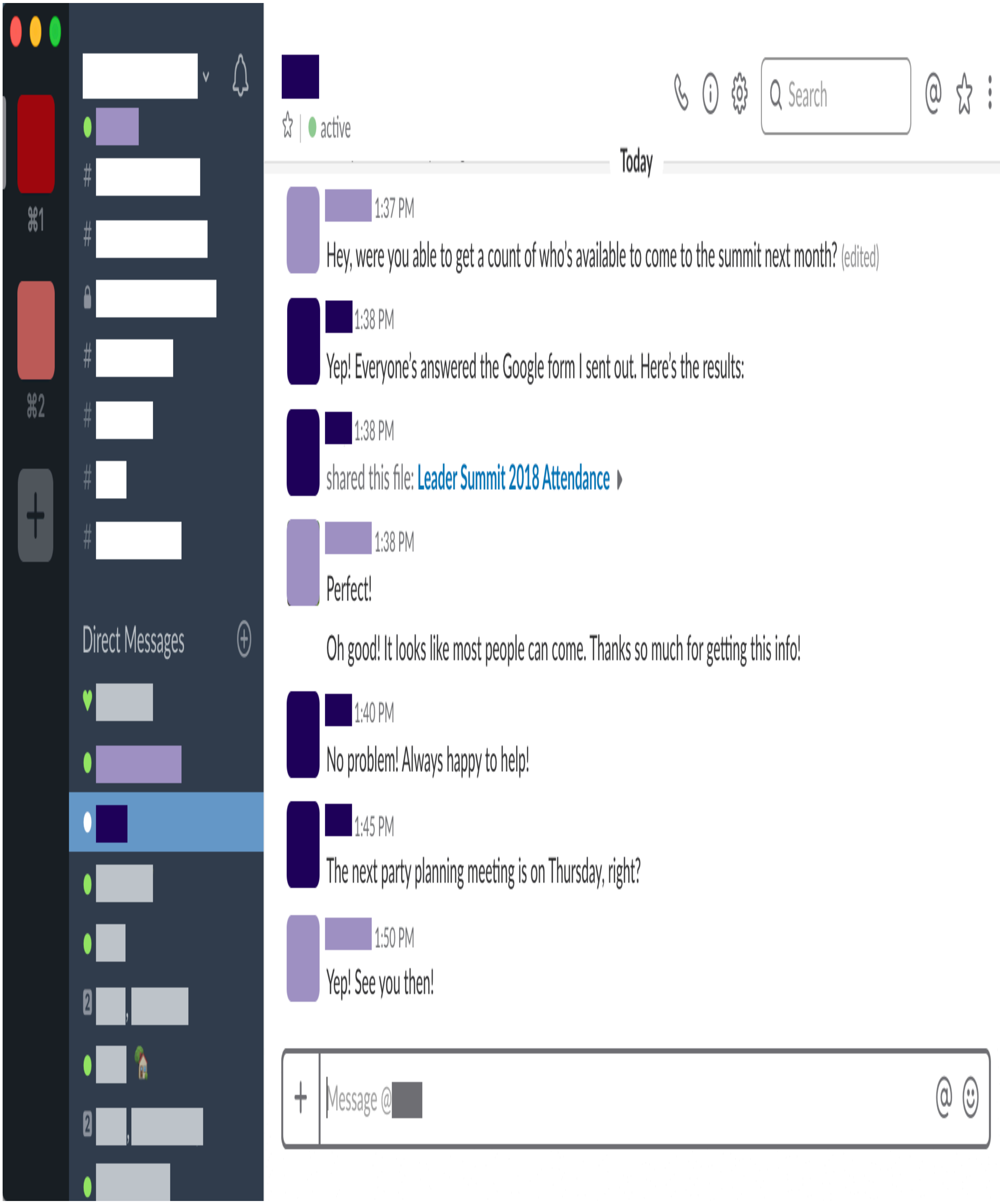

Figure 1. A chat conversation between two coworkers discussing attendance of a future summit.

Another form of a short informative message could be a Twitter message, or tweet. Tweets are better for communicating with larger audiences, possibly external as well; in fact, one of the primary uses of Twitter (by companies) is advertising and promoting their brands. (We discussed Twitter in more depth in Module 10: Social Media.)

If the situation requires a more formal approach for your message, sending an email is usually more appropriate. In this example, the communication is being sent to a company executive from a subordinate.

To: Dave McCann

CC:

Subject: Change Of Plans (the customer wants to meet before lunch tomorrow)

From: Jon Parks

Good morning Dave,

Our contact just sent me a message requesting that we meet in their lobby at 11:00 am instead of meeting for lunch at 12. Will that work for your schedule?

Thank you,

Jon

Jon Parks

Senior Account Manager

Code Software

PRACTICE QUESTIONS

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Long Informative Messages

While long informative messages can be delivered through a variety of mediums, they will typically hit the same beats regardless of the delivery method. As with all business messages, it's important to keep concision in mind. While there certainly are more complex messages that require longer communications, remember to stay focused and only provide the information your audience needs.

The Message

This example is an email message providing a sales team with suggested verbiage for mass messaging to partners and retailers.

To: Rize Outreach Team

CC: Rize Executive Team

Subject: Happy New Year from Rize Fitness

From: Regina Black

Hello Team,

The following is the standard messaging for our long-term partners and coaches about our work in the past year. Please feel free to customize this message based on your knowledge of the gyms within your regions. Please let me know if you have any questions or concerns. Here's to a great year!

> As we begin the new year, I can't help but reflect and acknowledge it's an exciting time to be working in fitness.
>
> Reviewing what we accomplished last year collectively across all of our gyms and our partners' gyms, we're proud to announce that we finished 2017 with record-smashing enrollment figures: 230,000 members across 48 gyms during 2017! We're on track for even faster growth in 2018, with at least three new gyms opening next year.
>
> But memberships and new locations are just part of the story. In the end, those figures are only meaningful if we are also improving our members' lives. In 2017 we saw important progress in measurably improving not only our members' physical health, but improving their mindsets about healthy lifestyles by introducing our new "Healthy Life Healthy You" classes.
>
> As 2018 rolls forward, I feel it's important to be deliberate about the commitments Rize is making to you, as well as the change Rize exists to create for its members. We commit to make fitness achievable and rewarding for all individuals, regardless of their particular goals or needs.
>
> In 2018 and beyond, Rize is growing in ways that expand our collective impact. I invite you to read my recent blog post (Note: Note that in a real email, this would be the perfect place to include a link to give reciepients the opportunity to further engage with your content!) highlighting some of our recent findings and success stories that confirm we're on a promising path.
>
> Thank you, on behalf of the full Rize team, for your partnership and support. I'd love to hear your thoughts and feedback about the blog post, and your own reflections about your goals and challenges in our work together. Please reach out.
>
> Best,
>
> Regina

The situational context of a message is key to its success. Some messages will be targeted for internal employees with a specific call to action to use the text provided to expand a marketing effort. Others work as a means of communicating with customers and would-be customers to rebut apparent negative comments from competitors. Others may bring an array of products and services together conceptually for greater understanding for the targeted audience. Still others will deliver lengthy product feature details in a casual, friendly and unassuming manner.

Delivery Methods

Long informative messages can utilize multiple communication vehicles. The primary delivery methods you'll run across are email, blog, presentation, and podcast.

- Emails can be considered the "default" delivery method for business messages. While they can be effective if written well (after all, they're delivered directly to the person you hope will receive the message), they can also appear bland if not executed correctly.
- A blog can be used to inform about, promote, and build a brand. It can also serve to personalize a brand by showcasing the perspectives of those who work at the company or it can serve to build a community by promoting the work of outside authors.
- Presentations are a great way to communicate large amounts of detailed information or utilize graphics to convey complex ideas to a defined audience. Graphics can be utilized to inform the audience of several connected ideas.
- Podcasts can be quite effective as informative messages. They give businesses an opportunity to engage in more casual conversation, but they can still be packed with very detailed functionality information about how the products or applications work and serve customers.

PRACTICE QUESTIONS

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TEAM-FOCUSED MESSAGES

What you'll learn to do: Discuss the importance of team-focused communication in business.

Teams are becoming the standard vehicle of productivity in the workplace; therefore, team-building and team focused messages are more important than ever. We will explore how team-focused messages can be crafted to be most effective. Also, we will focus on what means are used to allow teams to communicate across locations.

LEARNING OUTCOMES

- Discuss the purpose and use cases of team-focused messages in a business context
- Write a short team-focused message
- Write a long team-focused message

What is a Team-Focused Message?

Before we can understand the purpose and use of team-building communication, we should start with a discussion of the importance of collaborative teams in today's workplace.

There are multiple benefits of collaborative teams versus individuals working independently. First, we notice an increase in creativity due to the sharing of different ideas, experiences and expertise. Every employee brings a certain body of skills and knowledge to the group. Shared knowledge and complementary skills are strong tools to be used to handle complex projects and assignments. The more the team talks about a project, the more ideas are generated. Having the perspective of several colleagues trumps the individual having only one set of ideas.

Secondly, we see an increase in productivity from collaborative and empowered teams. In the technology industry for example, high-performing teams are the norm in the workplace. The team works with the business owner to decide exactly what work is committed to be completed in a set amount of time. The team then works together to break down the work into manageable tasks. During that work cycle, the team talks every day about their progress and work may be shifted between team members based on availability and expertise. As the team remains together over several work cycles, there is a measurable increase in the amount of work the team can accomplish.

Other benefits of collaborative teams are: (Note: The Lean Startup, Eric Ries, 2011www.sandler.com/blog/6-benefits-of-teamwork-in-the-workplace])

1. Teams promote a wider sense of ownership.
2. Teams encourage healthy risk-taking.
3. Teams contribute to employee satisfaction and retention.

Given the benefits of collaborative teams in the workplace, the key is how organizations can create the proper environment to foster team creation, collaboration and growth. The right conditions have to exist to encourage trust, camaraderie, and the sharing of experience and expertise. Team-focused communication is a key component in successful teams.

Team-focused communication messages can take a variety of forms including IM, text, chat, email, video, audio, and document sharing. Team-focused messages can be short or long, casual or formal, but they must always be professional. Since teams are usually geographically distributed, virtual and/or remote, companies must provide the tools and platforms to promote and facilitate team communication. While this whole course has emphasized the importance of editing and proofreading, you can generally be more casual about these matters with group chats.

PRACTICE QUESTIONS

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Starbucks recently adopted a team communication platform from Facebook called Workplace in order to foster organic, peer-to-peer collaboration. After only several months, Starbucks report that more than 80% of the organization's store managers use the platform weekly. You can see from the case study how important team-focused communication can be in the workplace.

> "In early 2017, when one store manager commented on a popular off-the-menu beverage, other managers chimed in and soon 40 other managers said this secret beverage was increasing in demand. That night, the category marketing team at Starbucks HQ saw the comment thread and, based on the drink's popularity, decided to make it an official menu item. What usually takes several months was possible in less than 24 hours, thanks to the collaboration through Workplace." (Note: [https://www.facebook.com/workplace/case-studies/starbucks])

Short Team-Focused Message

Since interactivity is a key to teamwork, a chat environment is a great team-focused communication platform. Short team messages can be communications such as status updates, meeting requests, notes of appreciation, or a invitations to a meet-up after work. Giving the team a way to respond as a group can be important in order to get everyone's ideas and opinions in the same message thread. Figure 1 shows three team members commenting on the status of a PDF.

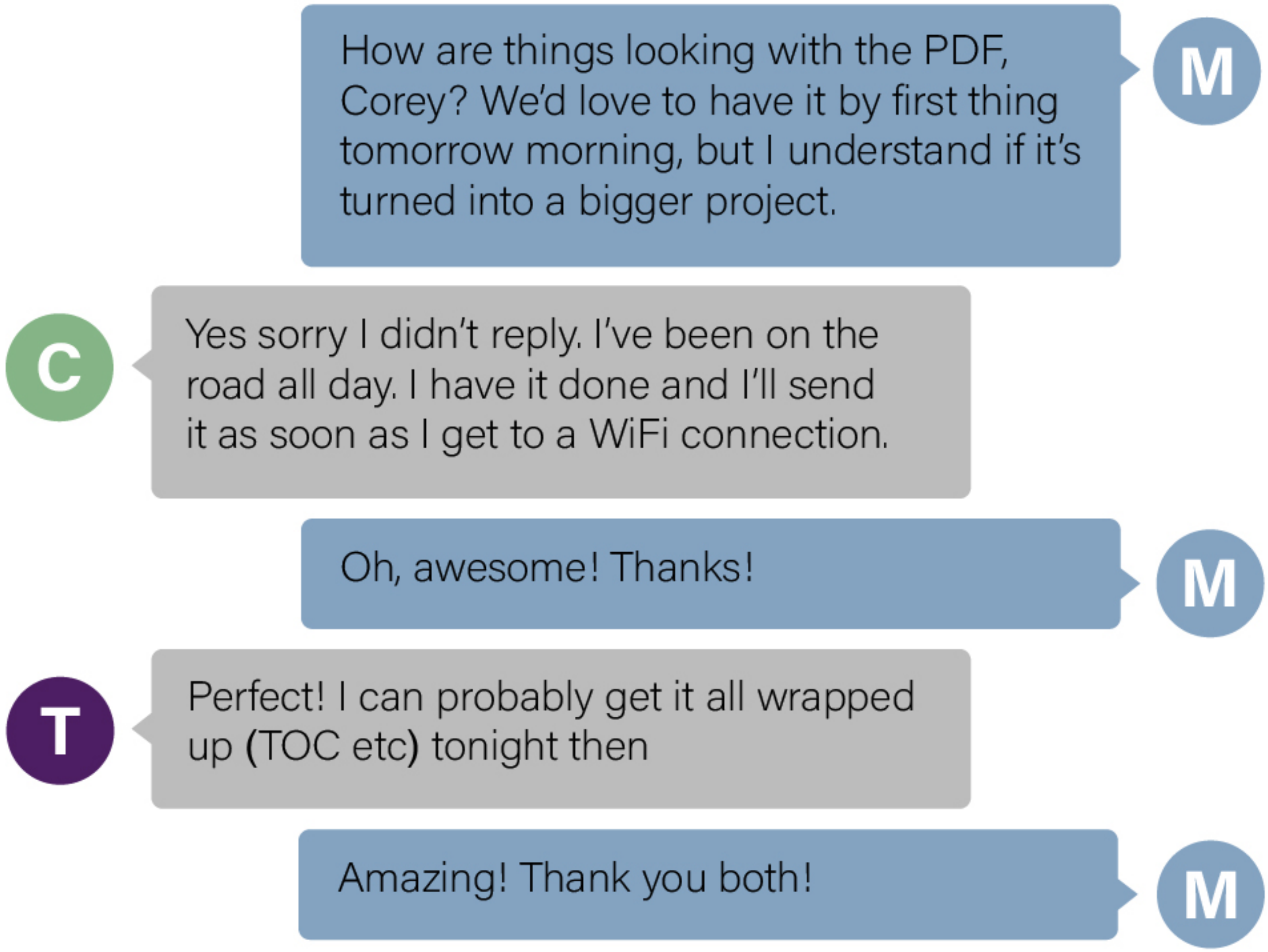

Figure 1. Chat between three collaborating team members

A short team-focused message can also be in the form of an email, especially for quick file attachment sharing to multiple team members.

To: Jeffrey Penrod
CC: Matt King, Joe Abbott, Mary Thomas
Subject: Here are the notes from today's meeting
From: Tom Eastmen
Attachment: Meeting Notes 5-2-17.docx

Hello All,

As promised, the notes from today's session with the customer are attached.

Thank you,

Tom

Tom Eastmen
Product Manager
XYZ Inc.

Team-focused communication is a great vehicle to keep team members informed, ensure projects are moving, and ultimately achieve strong results. Given all of the technology available in the workplace today, it is even easier than ever to create and send messages to your colleagues. One caveat: be aware and considerate of your teammates personal space. If you send an email, don't text or IM right away to ask if they received your message. Don't bother your colleagues after hours or on weekends unless you have mutually agreed to do so.

PRACTICE QUESTIONS

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Long Team-Focused Message

When considering how to communicate a fair amount of information to your team, it is wise to step back and consider which channel would be best, not only to send your message but also to allow for your colleagues to comment and interact with the rest of the team. Here is an example of a long message to a technical team sent via email.

Hi Team,

I had the opportunity to talk to some customers about our primary competitor's new product. Here are some of the areas where it may fall short based on the feedback. Many people agree that Product X is easy to use and adopt; however, the problem is you also need to provide access and views for other users and roles across many teams so that the whole organization can view performance.

Product Managers using Product X complain that there is no way for them to manage a single backlog for multiple teams or report back on how the teams are doing on higher-level initiatives. As PMs you need a lot more than issue tracking to manage the growth and development of your product line.

Portfolio Managers involved in setting strategy are limited with Product X on how to represent investment themes in an agile enterprise. They need more visibility than just an iteration or two of work. The need would be for more layers than just a stream of customer requests and defects.

For **Development Managers and Engineering Managers**, Product X doesn't provide them the ability to do capacity planning. At the root of that is the ability to get a good understanding of their team's velocity—something that is not possible if you can't split stories across multiple iterations. In the Product X world, you have to move the whole story if you can't finish the story in one iteration. As a result, stories languish across multiple iterations, and the whole concept of velocity is lost. With no understanding of a team's velocity, productivity improvements and predictability metrics are lost as well. With no capacity planning across multiple teams—or people split among teams—managers struggle with their ability to manage people and resources needed to meet their commitments.

Program Managers complain that they are “swimming in a sea of user stories” that are not associated with higher-level objectives. There is no concept of a multiple project hierarchy.

I will keep you posted when I receive more feedback.

Thanks,

Ellie

What can we say about this message? Yes, it is long and contains much detail. The author has broken it up nicely with boldface headings to make it more readable. Besides using email to send this message, what other means could the author use to inform the team in the most interactive way? Certainly short message forms like IM, text, and chat would not be appropriate for the volume of information.

A report, blog, podcast or document- sharing repository could handle the amount of information, but each would have some drawbacks. Reports are good for large amounts of data but are not interactive in nature. Podcasts would also be good for the first viewing, but they are static, and the information is not searchable. A blog could be a good answer because it could become a “living” document for team members to append as more information about the competitor’s product become available. The drawbacks of using a blog in this scenario would be managing hundreds of such blogs being used for multiple topics as well as quickly finding the blog you want in the corporate wiki. The same drawbacks could be in play with standard document-sharing technology when you have hundreds or thousands of emails or documents to handle.

The best way to send and manage long, team-focused messages could be to take advantage of some of the new team collaboration software platforms. Applications like Stride, Slack, Workplace, Flowdock and others help teams keep related information—whether it is received as a IM, chat, email, report, or podcast—organized by topic or subject category, including the feedback from team members adding new content or commenting on existing material. (See Module 9: Communicating Through Technology for more information on collaboration software/multi-feature online platforms.)

Figure 1 shows Facebook’s Workplace. All of the messages, chats and announcements on the page look to be general team information. For a specific project, you could envision everything on a page having to do with that project—e.g. emails, team chats, links to related outside articles, links to related areas in the wiki—collected in one place.

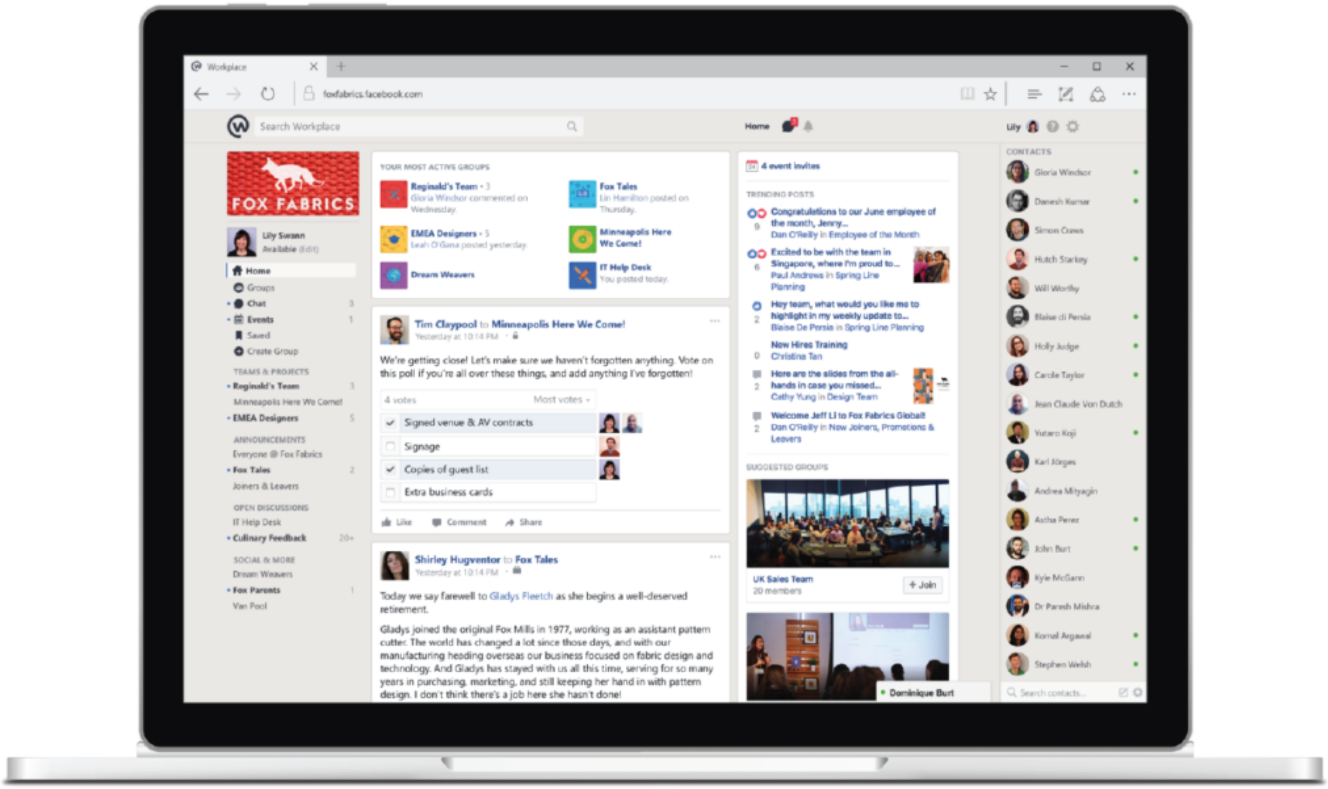

Figure 1. Workplace by Facebook is just one collaboration platform you could use

PRACTICE QUESTION

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PROFESSIONAL CRITICISM

What you'll learn to do: Write a business message criticizing internal or external business situations.

Critical messages are a different category of business messages, and there are different types of critical messages. How would you write a critical message to an outside company you are not associated with versus a critical message to a customer? How would you write a critical message to a subordinate or a colleague?

LEARNING OUTCOMES

- Differentiate between different types of criticism in business
- Write an external critical message to a company you're not associated with
- Write an external critical message to an existing customer
- Write an internal critical message to a person you manage
- Write an internal critical message to another colleague

Types of Criticism

What is the definition of criticism? Webster's defines is as "the act of expressing disapproval and of noting the problems or faults of a person or thing; the act of criticizing someone or something; a remark or comment that expresses disapproval of someone or something." Criticism in the workplace is generally imagined as situations around a manager and a subordinate, but it is not limited to that. Constructive, sometimes negative, thoughts and comments can also be applied to the actions of colleagues, customers, or vendors—basically persons, groups or things that do not meet the expectations of the beholder. We will discuss these topics in more detail in a later section. (Note: https://www.merriam-webster.com/dictionary/criticism)

How do you write about issues in the workplace that are negative or need improvement? When putting criticism into writing, the technique will vary based on the situation—who is performing the criticism and who or what is being criticized. Written criticism in the workplace may be approached in a direct versus indirect style, a constructive style, or an active versus passive voice style.

Here are some examples of active voice versus passive voice style:

Active voice: I cannot authorize your entertainment entries on your expense report.

Passive voice: Entertainment entries are no longer covered in our expense policy.

Active voice: Company policy prevents us from offering direct deposit until employees have been on the job for 3 months.

Passive voice: Direct deposit is offered only after employees have been on the job for 3 months.

The goal of constructive criticism is to improve the behavior or the behavioral results of a person while consciously avoiding personal attacks and blaming. This kind of criticism is carefully framed in language acceptable to the target person, often acknowledging that the critics themselves could be wrong. Insulting and hostile language is avoided, and phrases are used such as, "I feel…" and "It's my understanding that…" and so on. Constructive critics try to stand in the shoes of the person being criticized and consider what the situation would look like from their perspective.

Direct versus indirect written criticism style involves the order in which the criticism, the reasons for the criticism, the "buffer" and the close are structured in the message. Using the indirect style is best for reducing resentment and keeping employees open to receiving bad news constructively.

Here is an example of direct-style written criticism:

> To: Ned Turner
> From: Nancy White
> Subject: Your Social Media Use At Work
>
> Dear Ned,
>
> [Criticism] You must cease your social media use during business hours at once.
>
> [Reasons] Company management believes that it is too great a risk to allow employees to use social media while on the job. They worry that you could compromise sensitive company information. At the very least, much time is probably being wasted online when productive work could be done.
>
> [Close] We appreciate your compliance.
>
> Best regards,
>
> Nancy White
> VP Marketing

Here is an example of indirect-style written criticism:

> To: Ned Turner
> From: Nancy White
> Subject: Your Social Media Use At Work
>
> Dear Ned,
>
> [Buffer] The company greatly appreciates the insights gained from your activity on social media. The information has been quite helpful in revising our future product plans.
>
> [Reasons] However, management has seen cases from other companies where sensitive information has inadvertently been shared with the public. The interactivity of social media has raised concerns that even well-intentioned use could be risky, and usage by younger employees could be more of a personal rather than professional nature.
>
> [Criticism] For these reasons, we ask that you refrain from using social media while on the job.
>
> [Close] You are a great employee, and we sincerely value you and your hard work for the company.
>
> Best regards,

Nancy White
VP Marketing

PRACTICE QUESTIONS

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Criticism of Other Businesses

Writing a critical message to an unassociated company should follow the following guidelines:

1. Be professional.
2. Use direct writing structure in most cases.
3. Be clear and concise.
4. Be fair and even.

In these critical communications to a third party, it is best to get right to the point. Explain the situation clearly and concisely, including all relevant facts. Be fair and even so that you can maintain a good professional relationship with the company.

Here is an example of a critical message to a third party.

To: Customer Service: Franklin Illumination
From: Helen Hubka
Subject: Your Sub-Standard Performance For Our Gala

To Whom It May Concern:

I am writing on behalf of the Jones Company regarding your service at out gala last week where your company was contracted to provide lighting.

We are extremely disappointed with the performance of your company. First, the lighting was not consistent with what your salesperson had promised. Instead of four banks of spots, there were only three. That left the entire coffee area in the dark for the evening. Second, the motorized lighting that was to follow the speakers from side-stage to the podium was completely non-functional. We were told by your technician that there was a "computer glitch." Finally, the special audience illumination at the end of the award presentation did not come on in time.

Before you send us the final invoice, we believe there should be some remuneration for the lapses in your service that evening.

Best regards,

Helen Hubka

Director of Operations

Jones Company

This example follows the listed guidelines fairly closely. The point of the message is clearly stated in the message subject line. The tone of the message is professional and even, despite the firmness of the language. The message contained three examples illustrating the reason for the criticism. The close requested compensation for the poor performance, which should come as no surprise given the body of the message.

PRACTICE QUESTIONS

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Criticism of Customers

We have discussed the importance of happy, satisfied customers to the success of a business. But what if an issue arises that necessitates a critical message to an existing customer?

When the need to send a critical message to a customer arises, we should take a step back and think through several factors. What is the exact outcome we desire? How can we communicate firmly yet tactfully so as to maintain our good business relationship? What facts need to be included in the message?

The indirect strategy would be best for a critical message to a customer. Such a message should start with some complementary language about how the relationship is valued. Next, a full explanation of the facts of the matter and any context should be given. After this buffer, the criticism or critique should be revealed, followed by a warm closing.

To: Mike Cross

From: Bill Langely

Subject: Could I ask for your assistance on an important matter?

Dear Mike,

I hope this message finds you well.

It is hard to believe that we have been doing business for over 10 years. The relationship between our companies has been mutually beneficial, and we hope to continue working with you for another decade.

As you may know, we have contracted out our A/P department to a third-party company. They rely on a different financial system than the one we used in all of our prior dealings with your company. Apparently, this system cannot handle your firm applying credit memos to our invoices directly; they must be handled as separate line items. As a result, several of our invoices to you are now showing as late or delinquent. Our finance folks and yours have had several calls on this matter, but apparently your staff wants to continue the older process because it is easier for them. Yours is the only company that still maintains this Payable practice.

I think perhaps you meeting with your CFO would go a long way to satisfy this issue.

We look forward to working with you and your marketing team on our joint efforts at the June trade show. I feel positive about strengthening our relationship as business partners and the bright future ahead.

Best regards,

Bill Langeley

VP Marketing

Arrow LLC

This example message follows the indirect strategy for a critical written communication. The subject line gets attention but delays the bad news until after the buffer. The opening is pleasant and complimentary. The buffer attempts to explain the necessary facts and context, e.g., Mike's company is the only one with the problem process. The bad news is passive voice (instead of: "Can I ask you to get involved directly to meet with your CFO to resolve this matter?"). The close avoids referring to the problem and instead has a pleasant, future-looking statement.

PRACTICE QUESTION

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Criticism of Employees

The best way to write a critical message to a subordinate is to keep it as constructive as possible. Employees are the ultimate competitive advantage and must be valued. Your performance as a manager largely depends on the performance of your subordinates.

The goal of constructive criticism is to improve the behavior or the behavioral results of a person while consciously avoiding personal attacks and blaming. This kind of criticism is carefully framed in language acceptable to the target person, sometimes acknowledging that the critics themselves could be wrong.

Insulting and hostile language is avoided, and phrases used are like "I feel…" and "It's my understanding that…" and so on. Constructive critics try to stand in the shoes of the person being criticized, and consider what things would look like from their perspective.

Effective criticism should be:

- Positively intended, and appropriately motivated: you are not only sending back messages about how you are receiving the other's work but about how you feel about the other person and your relationship with him/her. Keeping this in mind will help you to construct effective critiques.
- Specific, allowing the individual to know exactly what behavior is to be considered.
- Objective, so that the recipient not only gets the message but is willing to do something about it. If your criticism is objective, it is much harder to resist.
- Constructive: consciously avoiding personal attacks, blaming, insulting language or hostile language. Avoiding evaluative language such as "you are wrong" or "that idea was stupid" reduces the likelihood that the receiver will respond defensively.

As the name suggests, the consistent and central notion is that the criticism must have the aim of constructing, scaffolding, or improving a situation, a goal that is usually subverted by the use of hostile language or personal attacks.

Effective criticism can change what people think and do; thus, criticism is the birthplace of change. Effective criticism can also be liberating. It can fight ideas that keep people down with ideas that unlock new opportunities while consciously avoiding personal attacks and blaming.

Here is a video that provides more details on how to deliver negative feedback effectively:

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PRACTICE QUESTIONS

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Criticism of Colleagues

As the workplace shifts to a more team-oriented, cross-functional environment, employees are being asked to provide feedback on colleagues on a regular basis. This can be a good thing because personal performance need not rely exclusively on the evaluation of one individual manager. Who better to provide feedback than a fellow teammate that has daily interaction with a colleague?

It does not take long to realize that providing feedback on a coworker could be uncomfortable, especially if there is criticism involved. This would be a situation in which a constructive writing strategy would be useful. Here are some guidelines to ensure that your critical comments are perceived constructively:

1. Direct your comments at the behavior and not the person.
2. Keep the tone of your message neutral and objective—think about how you would feel reading the same comments about yourself.
3. Try to include positive behaviors as well as behavior to be improved.
4. Suggest positive steps in resolving the issue.

Here are some examples of constructive criticism addressed to a co-worker.

> You are doing a great job making the customer happy and compensating with extra hard work when things get a little behind. You could perhaps spend some time providing more training for the team to take some of the extra work off you and improve their skills in the process. You are fun to work with, especially when you share more of yourself with the team.

> Your dedication and motivation set a great example for the team. Your intimate knowledge of the technology of the project makes you indispensable. Sometimes when you are asked to help with a problem, you simply create a fix quickly without explaining the solution. It would be very helpful to include the team and explain the issues even if it slows you down a bit.

You are very professional and focused on the work running the project. You maintain a calm attitude even when large problems arise. It would be good if you could pay more attention to the tone of your direction to the team when assigning new tasks.

PRACTICE QUESTIONS

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RESPONDING TO CRITICISM

What you will learn to do: Write a response to criticism.

There will always be criticism to deal with in the workplace. How would you respond to criticism in a professional manner? How can you keep feelings of frustration with others or with a workplace situation from affecting your professional demeanor? We will explore how to respond to criticism in a professional manner in this section.

LEARNING OUTCOMES

- Discuss key points to a professional response to criticism
- Discuss ways to remain professional when you're feeling frustrated with others or a situation
- Write a short message responding to internal or external criticism
- Write a long message responding to internal or external criticism

How Do You Respond to Criticism?

How you respond to correction, criticism, and negative feedback demonstrates who you are. Thus, it is essential to learn how to take criticism gracefully, and treat these instances as opportunities to grow. If you immediately shut-down and act defensively, you're unlikely to learn and grow from past mistakes. Receiving correction is pivotal to your development.

Positive Responses

The first step in receiving criticism is to listen actively and make a concerted effort not to be defensive. Remember that giving criticism can be almost as hard as receiving it, so neither you nor your critic are likely to be entirely comfortable. Once your reviewer/critic has said their piece—whether in person or in writing—the following effective tools can help you respond:

1. Gratitude. Avoid extremes: don't get gushy or pretend it doesn't hurt. Just say thanks for your feedback.
2. Questions. Avoid statements until you've asked clarifying questions.
3. Restatements. "I hear you saying…"
4. Request for solutions. Ask for suggested solutions. Simple is essential; one or two is enough.
5. Happiness. Do corrective behaviors make sense and feel good? If the path forward isn't inviting, you'll avoid it.
6. Follow-up. Ask for a check-in meeting in two weeks for a progress report. Four weeks is too long. If your behaviors elicit negative feedback, solve them quickly.
7. Gratitude again.

Time

Sometimes it's worth taking a pause and delaying your response, rather than responding with your first reaction (which could likely end up being an overreaction). Correction is tough to hear. Listen, and if necessary, ask for some time to think it over. Be honest in your responses, and don't be afraid to ask for time: "This is hard to hear. Could I have an hour to digest your feedback?"

Transparency

Include those who were impacted by negative behaviors. Explain what you're working on and corrective actions. You go further when others know where you're going. In a few days, ask them how you're doing.

Open up don't push away.

Drop it and move on.

Ask for affirmation when you achieved goals. Reject nitpicking. Move on.

Responding well to negative feedback, toughens character, increases influence, and strengthens connections.

According to communications expert Jack Griffin, there is a six step process that you can use to respond to negative feedback in a constructive manner. Here are excerpts from his guidelines. (Note: Jack Griffin, "How To Say It At Work", 1998.)

> Step 1: Accept criticism as an opportunity. All criticism, even unmerited criticism is useful to you. Criticism, after all, may actually point out things that you are doing ineffectively or poorly—things you could do better.
>
> Step 2: Fight the impulse to respond defensively. Listen and learn.
>
> Step 3: Realize that the criticism is a perception, nothing more.
>
> Step 4: Do not meekly accept unjust or unfounded criticism, but don't reject it. Learn from it. Learn about creating more positive impressions.
>
> Step 5: Seize the opportunity to respond to criticism, to communicate in a way that can strengthen and enhance your relationship with your boss.
>
> Step 6: While listening to criticism, demonstrate that you are hearing the criticism.

PRACTICE QUESTIONS

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Negative Responses

Of course, while there are a variety of good ways to respond, there are poor or unproductive ways to respond to criticism. Here are examples of how **not** to respond.

1. "It's your fault too."
2. Making it personal.
3. Standing aloof
4. Minimizing.
5. Arguing.
6. Feeling attacked.
7. Finger pointing.
8. Excuse making.
9. Denial.
10. "I'll never be good enough."

Negative responses to negative feedback delay growth, destroy progress, and lose respect.

Remaining Professional When You're Frustrated

Behaving in a professional manner is a key to success in the workplace. Maintaining that demeanor, even in stressful times, can be a challenge. What does it mean to be "professional" at work? The definition varies, but usually includes possessing knowledge and expertise, being in a positive mood, meeting your obligations accurately and on time, respecting all with whom you interact, using proper language, operating ethically, having social and emotional intelligence and maintaining an appropriate appearance. Other terms describing professional conduct in the workplace are soft skills, protocol, business etiquette and polish.

Here is a video with some good advice on professional work characteristics:

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At one point or another, we have all been subjected to negative circumstances and situations in the workplace that can test the patience of even the most professional of us. We are human beings. Our professional demeanor can temporarily be dented—engaging fight or flight mode, berating yourself, and lacking clear thinking can occur. The key is to rely on our emotional intelligence to gauge our thoughts and actions during these trying times.

Here are some techniques that can help you deal with emotional reactions to negative situations at work.

1. Acceptance. It is normal to get mad when things go awry. Our brains are hard-wired to react in certain ways. It is best to step back and acknowledge that your emotions are normal so that you can move on to problem solving.
2. Displacement. While you are experiencing a range of emotions that you may not initially control, it may be best for a change of scenery. Get up from your desk, walk out of your office and take some deep breaths outside. Imagine how you would like to see yourself react while you calm down.

3. Articulation. Once you have spent some time thinking things through, it may be time to talk it out with the source of the issue. Remember your basic communication skills: Remember who you are communicating with and what will be effective in reaching them with your point.
4. Improvement. After recognizing and dealing with your feelings, it is time to understand the true source of the issue so it can be solved going forward. So you were called out on some errors made in your analysis, but you know that you were not given adequate notice to properly prepare the report and double-check it. Address this with your manager and request an appropriate process in the future to allow for more careful work. (Note: https://www.forbes.com/sites/melodywilding/2016/06/01/5-ways-to-stay-cool-when-work-is-making-you-angry/#3520ef557865)

PRACTICE QUESTIONS

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Short Responses to Criticism

In today's business world, your professional demeanor is not limited to your physical workplace. Your online presence is an extension of you and also must convey all of the characteristics we have discussed in the last section. Given the amount of cyber-bullying and just plain rudeness we all see online, it is even more challenging to maintain your professionalism when responding to an external critical message on social media.

Here are seven tips from Caron Beesley in her article "7 Tips for Dealing With Criticism of Your Business on Social Media": (Note: Beesley, Caron. "7 Tips for Dealing With Criticism of Your Business on Social Media." *SBA Blogs: Managing a Business*. 11 Oct 2012. Web. 10 July 2018.)

1. Get Listening
2. Should You Respond?
3. Don't Let Negative Comments Linger
4. Always Acknowledge, Never Deny
5. How to Apologize
6. Take the Conversation Offline
7. The Bottom Line

Using these guidelines, you can easily craft a short response like the following examples:

> Thanks for your feedback! We'll take a look at the issue and get back to you within a week.

> We are so sorry for your negative experience with our product. We've sent this issue to our customer support team, and they should be reaching out to you within the next day to resolve the problem.

Of course, if you promise to get back to someone, you need to remember to do so; however, these responses both show your willingness to hear complaints and follow tip number 6: take the conversation offline. By doing this, you can have a much more interesting and productive conversation with the person who is making the critique.

In addition to these guidelines, keeping things light and somewhat tongue-in-cheek can also be effective for a short message response.

WENDY'S ON TWITTER

Wendy's Twitter has a bit of a reputation for being irreverent and "savage" (just check out this article from Market Watch). While this brand of humor has gained Wendy's quite a bit of positive attention, some people argue that Wendy's is making outdated jokes, and simply trying to appeal to its audience by trying to be current. In response to this broad criticism, Wendy's tweeted the following:

> buy our cheeseburgers pic.twitter.com/tohfFsyeR4
>
> — Wendy's (@Wendys) June 28, 2018

In this tweet, Wendy's largely agreed with the comments that their Twitter account is a marketing move, but they were able to make a joke out of the interaction and maintain the tone of their Twitter presence.

PRACTICE QUESTIONS

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Long Responses to Criticism

Complicated workplace situations may require more extensive communication when criticism is involved. Remember that receiving criticism at work is normal. Whether it is coming from a co-worker or your manager, it is important to keep your emotions under control and be professional and even graceful despite how you may feel about the criticism.

If you are on the receiving end of internal criticism that requires a written response, it should be comprehensive in order to be effective. Some recommended guidelines would include the following:

1. Solicit all of the facts of the matter. Do not be afraid to ask for all the details.
2. Acknowledge what is stated and paraphrase in non-offensive words.
3. Agree if the criticism is true. Apologize if necessary. Explain how the critical remarks will affect your behavior and actions in the future.
4. Disagree if the criticism is not accurate. Be respectful and constructive in your response.
5. Think about finding a compromise position that will alleviate future concerns.

If the issue relates to a product or service failure experienced by customers or consumers, you might want to check with your company's legal department before responding. Issues that could lead to liability lawsuits should be handled carefully right from the beginning.

Here is an example of a response to internal criticism from a co-worker:

To: Chris Smith

From: Mike Hines

Subject: Your message regarding Dean Herzog

Dear Chris,

I received your message regarding Dean's participation at the regional conference last week. Your note was quite critical about his presentation being cut short in relation to the others. I realize that Dean is an important member of your team and was representing you and the rest of your team who could not attend the conference.

Let me begin by apologizing for the situation. Dean was the last scheduled speaker, and many of the earlier activities on the agenda ran over their allotted time. We did our best to keep everything on schedule, but many attendees came back late from lunch and really set us back on Friday.

I sent Dean a note apologizing to him directly. In the future, we will be more realistic about how much we can pack into a day of a regional conference and leave some extra time at the end for presentations that would be cut short due to schedule issues.

Best regards,

Mike

PRACTICE QUESTIONS

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PUTTING IT TOGETHER: COMMUNICATING DIFFERENT MESSAGES

As we have discussed in this module, business communication is an exercise in problem solving. The strategy for creating and delivering professional written messages calls for a thoughtful approach to the situation at hand, going beyond simply what you want to say.

We explored the prevalence of informative messages in the workplace. An informative message in the workplace is simply the sharing of meaningful information among people in an unbiased and professional manner. Informative messages can be short or long, formal or casual in tone, internal or external in focus, and direct or indirect in structure depending on the situation. Like all forms of communication, the purpose of informative messages is to promote understanding, encourage action, stimulate thinking, or promote ideas.

We listed the following guidelines for creating informative messages:

1. Get to the main idea as quickly as possible.

2. Use a greeting to identify the audience.
3. Be clear and concise with the presentation of information.
4. Check your message for grammatical errors.
5. Include a call to action.

For short informative messages, we discussed using IM and Twitter as delivery possibilities. For longer informative messages, we explored the use of email, blog, presentation and podcasts.

Our discussion then turned to team-focused communication. We started by stating the importance of collaborative teams in the workplace. Successful teams are the key to productivity in business today, and team-focused communication was shown to be a key ingredient in creating the proper atmosphere for building and supporting team-based workplaces. We then explored the many options for team-focused written messages and discussed the pros and cons of several of them. At the end of the day we came to the conclusion that team collaboration software platforms are probably the best answer.

Critical messages make up another large segment of communication in business. We discussed several likely scenarios: a critical message to a non-related company, a critical message to a customer, a critical message to a subordinate and a critical message to a colleague. Going back to our thoughtful strategies based on circumstances, we demonstrated how the direct versus indirect style, the constructive style and active versus passive voice style could be used for each scenario.

Finally we explored written responses to criticism. We noticed that this topic involved our behavior as much as our expertise when the criticism was incoming. We discussed ways to remain professional despite frustration and other workplace issues. And we discussed guidelines and recommendations for written responses to external and internal criticism. Even the best corporate culture will see conflict arise from within and without. The tools in this module will be invaluable in dealing with them.

MODULE 12: COLLABORATION IN AND ACROSS TEAMS

WHY IT MATTERS: COLLABORATION IN AND BETWEEN TEAMS

As Pedro scans through his morning email, he sees a message letting him know that the corporate office is offering a store remodel to the store with the best idea about how to increase customer purchases while decreasing operations costs. The email wants all proposals submitted within six weeks so the winning store will have the work completed by year's end.

That seems like a short amount of time. Pedro would need gather both customer and store data. After collecting all that, he would need to come up with some good ideas and probably have sketches made for his proposal. It's too much to do, but what an opportunity!

Pedro's store manager must think highly of him to put him in charge of the project. Pedro starts to make a list of what he will need. He quickly realizes there are not enough hours in the day for him do do all this work. He probably needs more background in some areas. His initial brainstorming list includes contacting the following teams and individuals:

- Customer Service for customer ideas
- Store Operations for practical matters of shipping and receiving
- Individual departments for trends in their areas
- Purchasing for the budget
- Maybe an external consultant for design support

That list started to look overwhelming given the six-week time frame. Pedro realized he would need help and needed to form a team. He started to consider the following:

- How the team would communicate
- How it would make decisions
- How often it needed to meet

Finally, there would be the biggest job of all: writing the response that would persuade headquarters to select Pedro's concept. Pedro needed to think about how the writing of the response would get done with so many experts providing input.

Pedro's lists just begin to recognize the power of teams in the workplace. Teams can accomplish much more than an individual. It's not just that teams can do *more* work; with several minds and experiences on one problem, the *quality* of the work improves as well. The written response would be so much stronger with a team of experts involved.

Teams do require intentional structure to be successful. While team decision-making might take longer, it produces a better, hopefully winning, result.

TEAM COMMUNICATION IN THE WORKPLACE

What you'll learn to do: Discuss the role and types of teams in workplace communication

We enter the workplace as individuals and then quickly interact with peers, work groups, and customer groups. As we make our way through our careers, we see that work is best accomplished with the power of others. Learning effective group and team communication skills advances your success and the success of your organization.

Developing a group or team is a useful approach to accomplishing a task. During this discussion, the terms "group" and "team" are used interchangeably. When developed and run effectively, a team can be used to pool the ideas and experiences of its members in search of a collective outcome. Organizations of all types can benefit from the work of teams. An effective team should be able to share experiences and provide members with feedback. By sharing experiences, teams can generate insight and become effective problem solvers through a collaborated effort. Developing a successful team requires understanding group dynamics and how to adapt to the strengths and quirks of team members.

This module provides skills related to workplace communication in these valuable groups and teams. It examines types of teams, roles of team members and how to communicate within teams.

LEARNING OUTCOMES

- Discuss the value of teams in business communication
- Discuss types of teams in organizations
- Explain advantages and disadvantages of teams and team dynamics
- Discuss impact of group size on communication
- Describe various ways of interpreting and responding to conflict in interpersonal communication

The Value of Teams in Business Communication

You hear a lot about teams every day—sports teams, disaster and rescue teams, and medical support teams. Teams exist because they are effective in achieving goals, especially when the goal is well-defined. In the business environment, reliance on teams has been growing in the last few decades as organizations become more virtual (operating over distance) and more structurally complex. Businesses rely on teams to perform tasks not well suited to more traditional organizational structures. The most common types of teams are discussed in this section.

Business organizations have both groups and teams. A group is formed around a common interest or purpose with the goal of sharing information, but there is no collective accountability. Employee groups may consist of social clubs or volunteer efforts. A team's focus is collective performance, with both individual and mutual accountability. For example, all of the people who work in accounting constitute a group, but people from each functional department who meet regularly to standardize financial procedures are a team.

Teams bring together members of the organization with a wide variety of skills to achieve a common goal. Organizations accomplish these goals by carefully selecting the type of teams they use.

PRACTICE QUESTION

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Types of Teams

The team is only as good as its members and the ways in which they interact with each other. Here are several types of teams that may be used in the workplace. As you read through them, consider their purpose and the likely communication issues.

Figure 1. Companies create different types of teams for different purposes.

Cross-Functional Teams

A **cross-functional team** is just what it sounds like—a team that pulls its members from across the different functional areas of an organization. These teams are typically permanent or long-standing. For example, cross-functional teams may be composed of representatives from production, sales, marketing, finance, and legal. The strength of this type of team lies in its members having different functional backgrounds, education, and experience. The diversity of experience contributes to innovative problem solving and decision making.

Cross-functional teams may be used to implement new solutions in the workplace. A simple example is a group of instructors who want to use grant money to purchase PCs for all four of their classrooms. In order to avoid unexpected difficulties and pitfalls, the instructors invite representatives from Campus Engineering and IT Security to join their team. Without this cross-functional team, the teachers might have overlooked the special electrical considerations of rack-mounted charging stations for the PCs or the special campus security software that must be installed. Including other departments leads to greater project success by using expertise from many areas.

Unfortunately, the very factors that give cross-functional teams strength can also lead to weaknesses. Without a strong leader and very specific goals, it may be hard to foster social cohesion in cross-functional teams and to create a system of accountability.

Task Forces

A **task force** is a group or committee, usually of experts or specialists, formed for analyzing, investigating, or solving a specific problem. Quite often, a task force is formed in reaction to a problem or specific event, and once the job is done, the task force is disbanded. The goal of a task force is to offer solutions, support, and, if possible, put preventive measures in place against future problems.

A task force might be used to assess the causes for declining customer traffic at a store location, for example. There might be team members from marketing who analyze competitors in the areas and changes in customer preference. There might be operational members who review internal procedures related to stock management and customer interactions.

Types of concerns that may generate task forces in the workplace include bullying, health and wellness, employee training, increasing customer sales, or improving employee job satisfaction. A **project team** is similar to a task force, but a project team is often ongoing and covers a wider range of tasks.

Virtual Teams

Virtual teams are groups of individuals working together with a common purpose but in different locations. Virtual teams by definition may overlap with the team types listed above. People may be in different time zones or even different organizations. The obvious advantage of a virtual team is the low cost, both in time and money, to maintain it. Meeting in virtual space increases flexibility for team members (people can attend from wherever they are) and allows the organization to use the talent of employees around the globe.

The idea of virtual teams is relatively new; however, the use of virtual teams has grown 140 percent from 2005 to 2018. (Note: Global Workplace Analytics. "2018 Alternative Workplace Strategies Fifth Biennial Benchmarking Study." Global Workplace Analytics. Accessed March 08, 2019. https://globalworkplaceanalytics.com/telecommuting-statistics.) Virtual teams are possible thanks to advances in communication technology, such as e-mail, the internet, videoconferencing, and collaboration platforms, and other products.

When considering virtual teams, remember that working across cultures can be as challenging as working cross-functionally. Working with team members from different cultures means working with potentially different leadership styles and decision-making processes. In the United States, managers tend to gather data, make quick decisions, and move forward, making corrections as need. Northern Europeans prefer to build consensus slowly, whereas the French are taught to debate and confront from the time they're in primary school. Some business consultants will tell you that decisions in Japan are made in small, informal conversations before the formal meeting ever takes place. All teams need to be sensitive to these issues, which may be far more prevalent among the members of virtual teams.

In spite of these barriers, many companies have been adopting virtual teams. SAP is the world's largest inter-enterprise software company with more than 30,000 employees in sixty countries. It relies on virtual teams to survive. It has five headquarters around the globe, each one with a specific area of expertise shared via virtual meetings. IBM and General Electric are corporations that also depend on virtual team strategies.

Self-Managed Teams

A **self-managed** team is a group of employees that is responsible and accountable for all or most aspects of generating a product or delivering a service. It could be thought of as a mini-company within a larger organization. Traditional organizations assign tasks to employees depending on their skills or functional department (sales, finance, production). A self-managed team carries out the supporting tasks as well, such as planning and scheduling the technical workflow, and human-resource tasks such as managing vacations and absences. Team members may take turns leading and assuming technical responsibilities.

An example of a self-managed team is a remote group of engineers that double-checks and configures technical sales data that is uploaded daily. Rather than wait for a supervisor to assign tasks to the group, the group manages job assignments based on availability and skills. The group then works with project managers to implement solutions, again based on the team rather than a supervisor decision. The work finishes with the billing team. When difficulties or disagreements are encountered, the team works it out for themselves.

Because of the autonomy given to self-managed teams, these teams have greater ownership of the jobs they perform. Some benefits of self-managed teams are that team members share accountability for what they accomplish, which can be a great motivator; individuals have greater commitment to the task because they're directly responsible for its results; and team members take on some of their manager's work so he or she can work on other tasks.

However, self-managed teams are not without problems. Groupthink occurs more frequently with these teams. Members may struggle during the transition from supervisor-led management to self-management, possibly because of lack of interpersonal skills or poor implementation by the company. Not surprisingly, the most effective self-managing teams are found in companies where the corporate culture supports democratic decision making,nd the employees are generally well-educated.

No matter how groups and teams come together, there are advantages and disadvantages that must be attended to, as in the unintentional assumption of roles by gender or age rather than by experience or expertise.

PRACTICE QUESTION

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Teams and Team Dynamics

It may seem obvious to say so, but groups are made of humans, and humans express behaviors that are both beneficial and detrimantal to the function of their teams. People who feel they are part of a team are often mutually supportive and report greater job satisfaction. However, not all teams are successful. In one survey, only 14 percent of companies rated their teams as highly effective (Note: Traci Purdum, "Teaming, Take 2," Industry Week 254, no. 5 (May 2005): 41–44.), around 50 percent rated them as somewhat effective, and 15 percent rated them not effective at all. In this module, we look at teams and how effective teams are developed. We start by looking at common behaviors that can help or hurt efforts to meet organizational goals.

Advantages

Teams bring together people with diverse skills to create something that no one person could do alone. A well-planned team improves motivation. Communication is higher on teams, and the diverse skill set means teams can discover new approaches. Because teams have specific shared goals, team members usually enjoy greater autonomy, variety, task identity, task significance, and feedback. Teams often enjoy the social support for difficult tasks, improving morale and motivation.

Another benefit of teams is to improve product and service quality. Each Whole Foods grocery store operates with an average of ten "self-managed" teams, including produce, prepared foods, groceries, etc. Each store also has a team made up of just the leaders from each team to facilitate communication and sharing. Each team takes responsibility for the quality of the products and service in its area.

Efficiency in product development is another advantage to building teams within the traditional hierarchy. Teams can analyze and identify dependent tasks in a nonlinear process, sometimes realizing startling improvements.

Employees also benefit from participating on teams. They develop relationships to people from other areas of the business and learn more about what is happening across functional department lines (cross training). Additionally, 69% of people who have personal relationships or friendships with their coworkers report job satisfaction and that they are engaged at work, compared to less than one third of people who do not. (Note: Dickson, George. "The Value of Peer Relationships at Work." Employee Recognition and Company Culture - Bonusly Blog. Accessed March 08, 2019. https://blog.bonus.ly/the-value-of-peer-relationships-at-work/.)

> This might be hard to take: your employees aren't loyal to your company — but they are loyal to the people that built it, and those who keep it running. Employees with strong bonds of camaraderie are more likely to remain loyal to their team, and stay longer as a result. (Note: Ibid.)

According to LaFasto and Larson in "When Teams Work Best," (Note: Lafasto, F., Larson, C., When Teams Work Best, Sage Publications, 2001) there are four aspects of a good relationship: constructive, productive, mutual understanding and self-corrective. These four aspects are the basis for LaFasto and Larson's Connect model (Table 1), which can be used to develop good relationships.

- A constructive relationship can also be between a person and the team. "Good relationships are constructive for both people." (Note: Ibid.) In order to have a constructive relationship, there must be trust and mutual understanding between both parties. Constructive relationships do not happen overnight, it takes time to develop trust and to be open with others.

- **Productive** relationships are important because if the relationship between two individuals on a team is not productive, the team may not be productive. Productive relationships also, "allow us to focus on real issues—the ones that matter—and to do so in a way that makes a difference." (Note: Ibid.)
- **Mutual understanding** is critical because, "[it encourages] us to focus on and understand the other person's perspective, and [it offers] us the satisfaction of being understood." (Note: Ibid.) Not only is it important to validate another person's point of view, it is important for us to be validated. It goes back to trust and building a constructive relationship; in order to be understood, you have to be able to understand others.
- Good relationships are **self-corrective,** like a good marriage in which each partner is committed to improving the relationship. By continuing to work on improving a relationship, you are developing trust and mutual understanding among the parties.

Social cohesion is defined as the willingness of members of a society to cooperate with each other to survive and prosper. In work teams, social cohesiveness means the members want to be part of the team and want to contribute to its success. Members of cohesive teams have social and emotional bonds to each other and to the overall team, which motivates higher commitment and performance. Southwest Airlines, for instance, works hard to develop cohesiveness in its organization. As a result, everyone is willing to work toward the success of the organization. That is why it is not unusual to see people pitch in on a task even when it is not part of their job. For example, pilots may help to load luggage if it helps maintain on-time performance.

The main factors influencing cohesion are size of the group, similarities among its members, and team success. Small groups tend to be more cohesive than larger ones because people can interact with each other more. Similarity among group members contributes to team cohesiveness because people with similar backgrounds are more likely to have fewer communication barriers and share views on what constitutes appropriate behaviors. People are generally more trusting of others when they share some important background experiences. In substance abuse recovery groups, for example, members know that everyone has had the same ailment and is dealing with similar experiences. When a team experiences success early in its development, members get reinforcement that their efforts can produce results. They are more likely to be motivated to continue to contribute. Success also creates a sense of pride that fosters feelings of belonging and mutual attraction in the team.

Collective efficacy is the team's belief that its members are capable of organizing and working together to reach its goals. Creating collective efficacy is a bit of a balancing act. If goals are perceived as being too easy to reach, members may not feel they have to put in their full effort. On the other hand, if goals are perceived to be too difficult, members may feel their effort doesn't matter because the goal cannot be reached regardless of how hard they work. In either case, social loafing may result. But when the goal is "just right," difficult but not impossible, the team will believe it can reach it only if it works hard together.

Psychologist Albert Bandura researched the relationship between efficacy and job performance and found that each affects the other. When a team achieves some success, it can build self-confidence and the belief that it can achieve more. The resulting collective efficacy, in turn, makes it more likely that the team will be successful. But a downward spiral can occur when both performance and collective efficacy are low. Poor performance makes team members question their ability, and the decrease in collective efficacy leads to more poor performance. (Note: Shauna Geraghty, "How Self-Efficacy Affects Workplace Performance," Talkdesk, March 23, 2013, accessed Aug. 2, 2017, https://www.talkdesk.com/blog/the-relationship-between-self-efficacy-and-workplace-performance.)

Figure 1. The relationship between success and collective efficacy is affected by self-confidence and performance.

Good planning and good leadership can both improve collective efficacy. When the tasks needed to reach the team's goals are being planned, initial activities should lead to demonstrable team achievements. When teams experience successes early in their development, they are more likely to build collective efficacy. Good leadership provides a clear vision for the team and articulates why the goals are important. The leader provides guidance, feedback, and encouragement. When teams receive timely feedback, they are more likely to understand the relationship between their effort and their performance.

As you work on developing good relationships, another way to foster good group dynamics is to identify strengths and weaknesses and assign group roles. For a new team that has not worked together, assigning roles can also help surface individual strengths and weaknesses. By simply assigning roles at the beginning of the project, a team can quickly focus on specific tasks. Everyone should be responsible for brainstorming, problem solving and offering their experience and knowledge, but some roles are more generic and may or may not vary by task. Here are four roles that no team should be without:

1. A Leader: In the event there is no clear chain of command, a team must be prepared to assign the role of leader. A leader can keep the team focused, mediate conflicts, and ensure that individuals are held accountable.
2. A note taker or scribe: Again, a simple idea, but documenting every meeting is an important step in developing a productive team. A scribe can quickly get a team up to date with past notes, so little time is wasted remembering where the conversation left off. By documenting and distributing notes from each meeting, the scribe can keep all members of the team equally informed.
3. Lessons-learned tracker: Identify one person to track both positive and negative outcomes of meetings and projects. This individual can solicit input from other members. Documenting what everyone thinks went well and why, and what did not go well and why, can keep a team productive by not repeating past mistakes.
4. Devil's advocate: Teams need to embrace conflict and different points of view. A devil's advocate is a person who brings up alternatives or objections to other's ideas. Assigning such a role can make the team more objective and reduce problems like Groupthink. Because this person's role can stir up conflict, it can be helpful to rotate who plays the devil's advocate for the team.

Think of cohesion as morale. It makes sense that a group that enjoys each other's company is more likely to come together to work toward a common goal. Once everyone is working toward success, little successes occur along the way. This success helps the team's morale spiral upward. Teams move past being solely task- or work-focused. They become work-friends, maybe even social friends. This closeness of relationship adds to the productivity of the team as members are more likely to speak directly even as difficult issues arise.

Disadvantages

There are also many problems that hinder good group dynamics. We don't usually have the luxury of picking who we are going to work with on a team; dealing with different personalities and personal agendas is a common challenge in working within a team. Other common challenges include poor leadership, a lack of focus, dominant personalities, bad communication, groupthink, and social loafing. The key to combating these challenges is to be able to identify when they are taking place.

Poor Leadership

The first challenge that hinders good group dynamics is poor leadership. There are a few things an individual can do if the poor team leader is your boss or someone with authoritative power. First, be supportive. If your boss trusts you and you are supportive, you may be able to influence decisions by suggesting alternatives. If the poor leader did not assign a devil's advocate, suggest it during a team meeting and explain why you think it would be beneficial. Once the devil's advocate is in place, coach him or her to bring up alternatives. When alternatives are out in the open and debated, the weak leader may see that there are stronger ideas available.

Lack of Focus

Lack of focus can make a team just a group of individuals. Keeping the team focused takes constant effort. A good leader can keep teams focused and on task by assigning roles and enforcing accountability. A good method to keep teams focused is using an agenda and distributing it prior to meetings. An agenda can get people on the same page and will encourage them to prepare based on the topics under discussion. Even a functional and mature team should have meeting agendas and planning documents in order to be sure no one is making assumptions about the group's direction or undertaking a plan that has not received consensus.

Dominant Personalities

Dominant personalities are difficult to deal with; the loudest voice doesn't always have the best ideas. Sticking to an agenda, establishing protocols during meetings, and having an effective leader can be used to combat strong personalities.

Bad Communication

Bad communication is a quick way for a team to be unproductive and ineffective. By using a scribe and lessons-learned tracker to document team meetings and activities, a team can be kept up to date and in the loop. An effective team leader can assign tasks and hold people accountable for their contributions, which can prevent social loafing and encourage good communication.

Groupthink

Groupthink is simply going along with the team on a decision because that seems to be the consensus and they want to avoid conflict. It can also be the result of the group talking itself into a decision that doesn't fit the facts. Having a strong devil's advocate will help reduce the chances of groupthink.

Social Loafing

Social loafing is when one or more group members fails to do their fair share of work within the group. You may have witnessed this behavior firsthand on a team or school project. There are two main consequences of social loafing: The free-rider effect is when one or more team members do not put in their share of the work, assuming others will cover their shortfall. The other is the sucker effect, where other team members reduce their effort in response to the free rider's behavior.

Several causes exist for social loafing. A member may not be motivated by a goal and may not want to work to achieve it. Or a member may feel that his or her contribution to the team will not be recognized, so the member is not motivated to contribute. Both of these causes are more pronounced in large teams. Social loafing is also more likely when there isn't an individual evaluation system in which the performance and contributions of members are regularly reviewed. Finally, if there is unequal compensation and the members of the team feel the compensation is unfair, they will be more likely to lessen their effort.

A good manager should monitor employees to watch out for these social loafers or "slackers." The manager is responsible for making sure all team members are carrying their fair share of the work they have been assigned. If the manager doesn't address occurrences of social loafing, they can create a stressful work environment that may turn into conflicts among coworkers.

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Group Communication Networks

In organizations, there are hierarchies of reporting structures. Those official links of authority and responsibility impact communication among individuals and groups. Here are some of those communication networks. In looking at these patterns, consider the lines that connect the end points to the other points as communication paths.

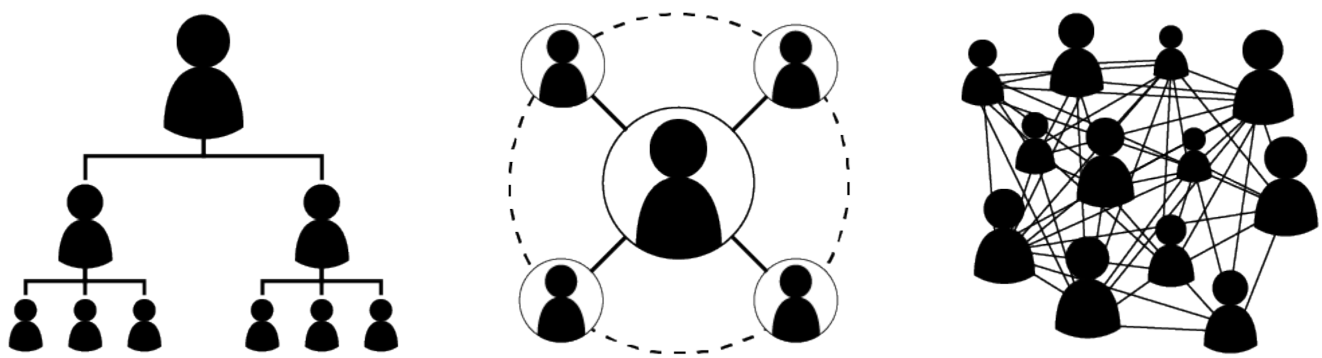

Figure 1. There is a wide spectrum of communication network styles in businesses

The importance of these patterns for team dynamics lies in the direction information flows, the power structure established, and the number of layers in the hierarchy. Think about the needs of your organization to find answers to questions and to solve problems. Communication flows in many directions, yet without structure and planning, it may overwhelm productivity and real communication, as illustrated in the third model in Figure 1.

Communication channels, the legs of these networks, multiply more quickly than people do. If everyone receives every message, "information overload" may occur, as employees are bombarded with messages in an unstructured manner. To maintain efficiency and the most effective use of the individuals on your team, take care in determining how and when information is shared. For example, some large organizations use newsletters or internal blogs as structured ways to disseminate routine updates. When structuring a communication pathway for your team, consider which team members need to know what and when as well as which tools are the most efficient for delivering which kinds of information.

PRACTICE QUESTION

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Conflict Resolution

Interpersonal conflict occurs in the workplace between individuals. Can also occur within working groups and is sometimes magnified in that setting. When we hear the word "conflict," we typically think about all the negatives associated with the word. Most of us would like to avoid conflict entirely; however, conflict can also be productive.

Positive conflict comes from recognizing disagreement as part of a healthy process. It is an exchange of passionate ideas. This exchange helps us find creative solutions as well as testing weaknesses of current solutions. The difficulty in keeping conflict positive is in having norms regarding how ideas are expressed and discussed.

A tolerable amount of conflict is vital to group success in order to avoid groupthink and to generate more innovative ideas among members of the group, who may have diverse opinions and points of view. In addition, positive conflict generates buy-in and offers elements of ownership and a sense of cooperation and enhanced membership to all of the group members. When members of a group feel safe expressing conflicting beliefs and opinions, groups are more productive and less prone to conformity.

Conflict is necessary for good results. Learning to understand and manage conflict is critical when working in organizations. Let's explore conflict more deeply in order to understand its broad impact and its direct impact on workplace communication.

Sources of Team Conflict

Let's take a look at a few examples of conflict within teams.

FUND ALLOCATION

A new product team may find itself split between allocating funds for the second release of the device or bringing a new product to market. The team may find about half of its members preferring one path and the other half advocating for the other.

In this case, the team may split into two factions—or more if there is additional disagreement within each group. Even if business considerations support one group's position more strongly, powerful personalities, interpersonal complexity, and group history can come into play to overwhelm those practical factors.

DIFFERENCES WITH MANAGEMENT

Employees may think, "Why doesn't the boss just ask us? We do it every day and that will never work." The boss may think, "Those employees don't realize what that will cost. It will blow the entire department budget in half the time."

Gaps in communication between leaders and the teams they lead can cause particularly thorny conflicts. There may be conflict with management because management has not given clear goals to the team or may not be supporting the team. The organization could have a culture that does not allow teams to work effectively. In extreme situations, this can lead to the team's refusal to follow the directions of its leader.

SALES VERSUS SERVICE

A company organizationally separates its sales employees from its service (installation and maintenance) employees. On more than one occasion, Sales asked, "What are those service people thinking? We can't charge the customer for every little thing." Equally frequently, service is asking, "What are those sales people thinking? Are they giving the company away? We can't install it for that little."

When different teams don't take the time to understand the roles and tasks of individuals on different teams, conflict can arise between different functional groups within the organization.

Unproductive negative conflict should be avoided and must be swiftly addressed and resolved when it does present itself. Because of the dangerous nature of negative conflict and the toll it takes on productivity and moral, it may potentially lead to Human Resource Management issues or even a lawsuit.

PRACTICE QUESTION

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What are the Symptoms of Team Conflict?

Symptoms of conflict are seen in the communications of the members. They illustrate themselves in a variety of ways. Once we recognize the symptom, we can find a solution.

Almost everyone has endured the experience of being part of a team that was plagued with conflict. Whether in a large group that erupts in anger and can't finish a meeting, or a small group of two or three individuals that resort to backbiting and gossiping to vent frustration over a conflict, everyone has been a part of a team where conflict has gotten out of control. With this in mind, there are several symptoms of conflict that can be identified in groups that can help them to recognize and manage conflict before it tears them apart. By identifying the following symptoms related to communication, trust, and opposing agendas, the team leader can identify conflict before it erupts. As you read through these symptoms, think of the teams that you are a part of and look for symptoms that exist in your team.

One common symptom of conflict is a lack of communication or a lack of respectful communication. This is most often seen when teams fail to have meaningful meetings. Most often, non-communicating meetings are characterized by team members sitting and listening to what the boss has to say. Often chatter or silence prevails among such teams. A lack of communication can also be noted when team members don't get along and so refuse to talk to each other. These feuds create barriers within teams and prevent communication. A lack of communication or disrespectful communication leads to a lack of trust, which is another symptom of team conflict. Teams that fail to produce desired results often lack the trust in one another as team members that is necessary to succeed. Without trust in a team, verbal or non-verbal conflict becomes the norm of the team. Team members spend more energy protecting their own positions and jobs than they do producing what is required for the team's success. When trust erodes in a team, the habit of blaming others becomes the norm as individuals try to protect themselves. Team members become enemies that compete against each other rather than allies that build and help one another to achieve a common goal. Teams that lack trust often gossip about other members or have frequent side conversations after meetings to discuss opposing opinions. Such activity sucks strength out of the team and its purpose.

Another symptom of team conflict can be seen when team members have opposing agendas. This is not to be confused with members who have different opinions. Having different opinions in a group can be very healthy if managed correctly because it can create better ideas and ways of getting the job done. However, when team members have opposing agendas, more is at stake than differing opinions; two individuals are fiercely committed to the exact opposite approach. Opposing agendas can create confusion in team members and can cause them to lose sight of their role in the team and of the team's final goal. Teams must work toward a common goal in order to be successful. Extreme effort must be made to reconcile differences, or such a team can look forward to failure.

Avoiding Destructive Conflict

In most instances of team conflict, avoidance is a worse solution than engagement with the conflicting situation. Moreover, avoided conflict will lead to less optimal solutions and may even prevent the team from finishing a project. Thus, from a manager's perspective, it is a simple equation of a cost/benefits analysis in that the cost to the organization is greater when teams avoid conflict than when they engage in it.

Fostering support, trust, and open communication is also essential if relationship conflicts are to be reduced and quickly resolved. Open communication can be established by the following:

- **Establish ground rules.** Some rules might include the following: Take turns when talking and do not interrupt. Ensure that each team member has equal time when stating their perspective. Listen for something new and bring something new to the discussion. Avoid restating the facts and "talking in circles." Avoid power plays, and eliminate status or titles from the discussion.
- **Listen actively and compassionately.** Avoid thinking of a counterargument while the other person is speaking. Listen to the other person's perspective rather than listening to your own thoughts. Don't make an effort to remember points just so you can refute them one by one.
- **Point out the advantages of resolving the conflict.** "I know you feel that is too much for us to spend right now, but we should figure out how to solve this problem. Then, we can figure out when to spend that money."
- **Maintain a neutral vantage point and be willing to be persuaded.** "Can you help me understand why…."
- **Avoid all-or-none statements such as "always" and "never," and point out exceptions when these statements are used.** Rather than say, "we have never done it that way," try "we had good reason for not doing that in the past, but let's talk this through to see if conditions have changed."
- **Create a goal of discovery rather than of winning or persuading.** "Let's set aside our final decision until our next meeting. This meeting, let's brainstorm solutions and try to put a cost to each."
- **Be alert to common goals and where goals overlap as each party is communicating their perspective.** "I'm not sure I reach the same conclusion as you, but a 5% decrease is something we do all appreciate."
- **Use clarifying statements to ensure the other party feels understood and listened to.** "What I heard you say is that you feel unappreciated and that you lack vital feedback to help you perform, is this correct?"
- **Help team members to separate the problem from the person.** "I know your job is to remind us of the rules, but could we try to approach this a different way?"
- **Use techniques such as role-playing, putting oneself in the competitor's shoes, or conducting war games. Such techniques create fresh perspectives and engage team members.** "Let me try to be the devil's advocate. You tell me your solution, and I'll be the technician trying to poke holes in the idea."
- **Team members should recognize each other for having expressed their view and feelings.** "I'm glad to hear your side all the way through. Thank you."
- **Help each team member to understand all the other perspectives, and help them to re-frame the situation.** "So, if I heard you correctly, you are concerned about x. Is it possible that we could address this by trying y?"

Solutions to Conflict

Conflict is a natural and necessary element of a healthy team experience. It will occur even in the best teams. It can be constructive.

A team that never experiences conflict is likely to be less productive than a team that does experience conflict. This is especially true if the task that a team is attempting to complete is complex in nature or highly detailed. Without having members question specific actions, specific decisions, or the specifics of the proposed solution, it may appear to the team that there is only one way to solve the problem or complete the task.

When choosing team members, consider making choices that will promote healthy conflict. You will want to avoid fostering groupthink while avoiding people who already clash with one another. People who want peace at any price and scramble to quash even productive, positive conflict are also not especially useful. While you may choose individuals for their personality traits, commitment is equally important. If team members are individually or collectively indifferent toward the overall goal, they probably will not perform well. A lack of commitment can also lead to a lack of conflict. If the team is committed to the overall goal and members are well chosen, there can be a healthy dose of conflict in the process to complete the task.

When conflict does occur, it is important to address it immediately. Although developing a solution to the conflict may take time, acknowledging it will help to ensure that it can become productive to the team. "Whatever the problem, effective teams identify, raise, and resolve it. If it's keeping them from reaching their goal, effective teams try to do something about it. They don't ignore it and hope it goes away." (Note: LaFasto, Frank M. J., and Carl E. Larson. *When Teams Work Best: 6,000 Team Members and Leaders Tell What It Takes to Excel*. Thousand Oaks, Calif: Sage Publications, 2002, p. 81.) By not addressing conflict, the leader risks sending the message that conflict is unmanageable, which can cause vested members to become complacent or feel their input is not valued. In the worst-case scenario, a conflict that is not resolved could go from being task oriented to personal.

How Do Teams Prevent Damaging Conflict?

In order to prevent damaging conflict, the team leader must lay a conflict-friendly foundation for the team. The following approach will help the team leader to set the stage for conflict that is creative and productive:

1. Set a clear goal for the team.
2. Make expectations for team members explicit.
3. Assemble a heterogeneous team, including diverse ages, genders, functional backgrounds, and industry experience.
4. Meet together as a team regularly and often. Team members who don't know one another well don't know each other's positions on the issues, impairing their ability to argue effectively. Frequent interaction builds the mutual confidence and familiarity team members require to express dissent.
5. Assign roles such as devil's advocate and sky-gazing visionary and change these roles up from meeting to meeting. This is important to ensure all sides of an issue have been considered.
6. Use techniques such as role-playing, putting oneself in the competitor's shoes, or conducting war games. Such techniques create fresh perspectives and engage team members.
7. Actively manage conflict. Don't let the team acquiesce too soon or too easily. Identify and treat apathy early, and don't confuse a lack of conflict with agreement.

Resolving Conflict

Interpersonal conflict should be managed and resolved before it degenerates into verbal assault and irreparable damage to a team. Dealing with interpersonal conflict can be a difficult and uncomfortable process. Usually, as team members, we use carefully worded statements to avoid friction when confronting conflict.

The first step to resolving interpersonal conflict lies in acknowledging the existence of the interpersonal conflict. Recognizing the conflict allows team members to build common ground by putting the conflict within the context of the larger goal of the team and the organization. Moreover, the larger goal can help by giving team members a motive for resolving the conflict.

As team members, we all understand the inevitability of interpersonal conflicts. Open and supportive communication is vital to a high performing team. One way to achieve this is by separating the problem from the person. Problems can be debated without damaging working relationships. When interpersonal conflict occurs, all sides of the issue should be recognized without finger-pointing or blaming. Above all, when a team member gets yelled at or blamed for something, it has the effect of silencing the whole team. It gives the signal to everyone that dissent is not allowed, and, as we know, dissent is one of the most fertile resources for new ideas.

When faced with conflict, it is natural for team members to become defensive. However defensiveness usually makes it more difficult to resolve a conflict. A conflict-friendly team environment must encourage effective listening. Effective listening includes listening to one another attentively, without interruption (this includes not having side conversations, doodling, or vacant stares). The fundamentals to resolving team conflict include the following elements:

1. Prior to stating one's view, a speaker should seek to understand what others have said. This can be done in a few clarifying sentences.
2. Seek to make explicit what the opposing sides have in common. This helps to reinforce what is shared between the disputants.
3. Whether or not an agreement is reached, team members should thank each other for having expressed their views and feelings. Thanking the other recognizes the personal risk the individual took in breaking from groupthink and should be viewed as an expression of trust and commitment toward the team.

PRACTICE QUESTION

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COLLABORATIVE PROJECTS

What you'll learn to do: Discuss strategies for working in collaborative projects

Now that we understand the value of teams in the workplace and the risk of conflict, let's look at how teams working collaboratively manage communication in order to be productive and healthy.

It's that old saying of "in, out, and across": team communications come in to the team, go out of the team, and pass between team members. As with all team skills, and all communication skills, there are structures which make communication more successful. We'll also take a look at some software tools that are designed to facilitate group writing.

LEARNING OUTCOMES

- Discuss different styles of decision making in groups
- Discuss digital tools for communicating with groups
- Describe the process of collaborating with others to create a business message
- Discuss digital tools for collaborative writing

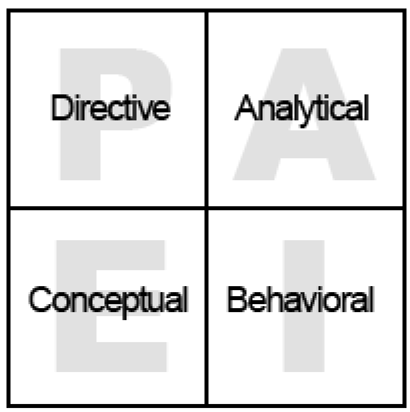
Decision Making In Groups

Up to this point, we have argued that teams create better outcomes than individuals. While those individuals come with a multitude of skills and experiences, the input of several individuals working in concert leads to more creative, better considered decisions. Group work and group success leads to higher morale. Another benefit is that with more members of the business involved in the decision, there will be better understanding of the decision, and thus, a greater buy-in or endorsement. This is why teams are used in the workplace.

We have pointed out how arguing occurs as we discussed conflict in teams. That conflict frequently is the result of the team working to reach a decision. Decision making in teams is complicated by many issues. Some of those issues relate to content, as discussed in the conflict section of this module. Difficulties may arise from negative member roles, such as social loafing. This can cost time as well as potentially harming the output. Another problem with team decision making may relate to the general difficulty of team communication. Remember the networks laid out earlier in this module that displayed how adding one or two members created a much more complex network? Such complexity may complicate the full sharing of relevant content. It definitely slows decision making as all members engage.

Decision Style Theory

Any decision is made in the context of its situation. The Rowe and Boulgarides Decision Style Theory examines the context for decisions across two continua. One side relates to the decision-makers tolerance of uncertainty (high tolerance to low) and the other relates to whether the individual is more oriented to the completing the task or to social accomplishment. These two continua form the axes for the model below. The four quadrants represent four decision-making styles.



Rowe and Boulgarides (Note: Rowe, A. J., & Boulgarides, J. D. (1992). *Managerial Decision Making.* New York: Macmillan Publishing Company.) suggest this largely determines how we will respond in decision-making situations.

The dimensions of variance in this decision style theory are cognitive complexity (ambiguity tolerance vs. need for structure) and value orientation (social/human vs. instrumental/task-centered). Crossing these dimensions yields four decision making styles: (1) directive (2) analytical, (3) conceptual, and (4) behavioral, described below in PAEI order.

P: Directive (Low ambiguity tolerance, Task focus)

Directive individuals need and value structure. They prefer to make decisions based on clear, undisputed facts and impersonal rules and procedures. They trust their own senses and short, focused reports from others.

The Directive style might do well with leading a group to meet Tuesdays versus Wednesdays. “Let’s meet Tuesday, unless someone has an objection.” However, the Directive style might not do as well in leading a group in conflict to reach conflict resolution : “Please stop your bickering, we need to move on.” In both examples, the leader of the group desires clear resolution that accomplishes the task.

A: Analytical (High ambiguity tolerance, Task focus)

Analytically-minded people can process ambiguity given enough time and information. They rely heavily on abstractions and instrumental logic, and they tend to go over all aspects of a problem with a fine-toothed comb, carefully acquiring and organizing large amounts of data. They consider every aspect of a given problem, acquiring information by careful analysis. When presented, their solutions are comprehensive, detailed and very thorough. They may also be innovative if the analysis turned up novel information or supported novel reasoning.

Analytical team members or leaders want information that leads to a conclusion. They are willing to invest the time and effort to reach the optimal solution. "Let's each take a quarter from last year and dig in to see which model, by color, sold best in each state to that we can prepare out best forecast for next year," seems well suited to this style. This decision appears to take some time. This style may not work well with determining which benefits to include to the health care plan next year along with a hiring plan designed to expand diversity. The Analytical style will look toward the data and may overlook the more human-focused issues presented with the new hiring plan.

E: Conceptual (High ambiguity tolerance, Social focus)

Conceptual decision makers are creative, exploratory, interested in novelty and comfortable taking risks. They are big-picture, creative thinkers who like to consider many different options and possibilities. They gather and evaluate information from many different perspectives, integrating diverse cues and passing intuitive judgments as they work to identify emerging patterns.

The Conceptual decision style may work well for determining how to provide maintenance support to customers living in six different countries with varying cultures and laws. A great deal of data and consideration of culture will be needed. This will not be a data-only decision that occurs in a short period of time.

I: Behavioral (Low ambiguity tolerance, Social focus)

Behavioral decision-makers focus on the feelings and welfare of group members and other social aspects of work. They look to others for information, both explicit information in what others say and implicit information sensed during interactions with them. They evaluate information emotionally and intuitively.

Behavioral decision making will focus almost exclusively on relationship, rather than on task. The decision-making process will take as long as is required for the Behavioral style to interact with most individuals impacted.

The purpose in understanding this model is to understand how individuals have conflicting desires and how situations must be considered against that preference.

PRACTICE QUESTION

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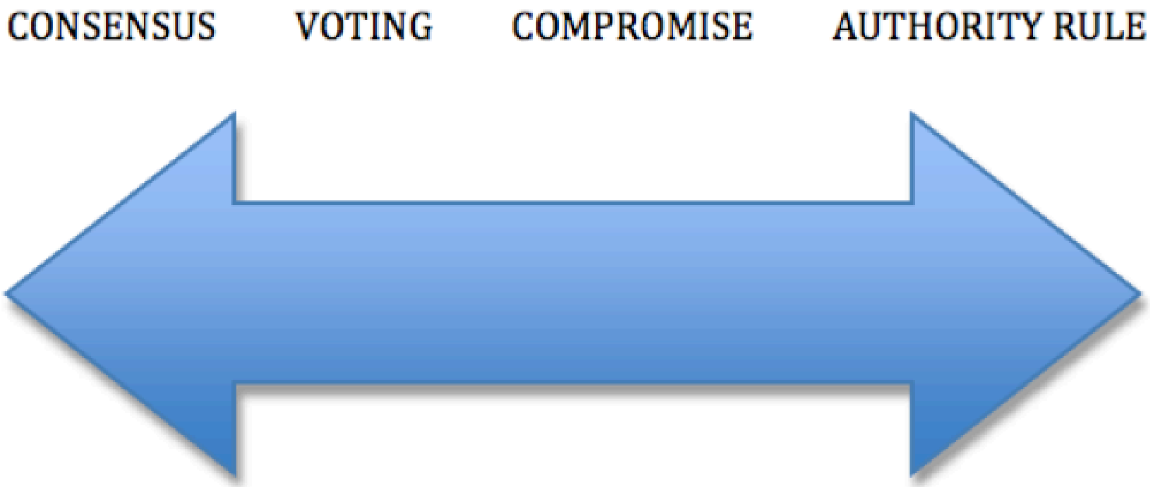
How to Make Decisions

There are group decision-making mechanics aligned to team development and the styles listed above. They need a method to implement the atmosphere each style invokes. The styles above do not directly relate to the methods below, but you can see how, in an effort to keep conflict low, the style may align to the method.

When groups need to get a job done, they should have a method in place for making decisions. The decision-making process is a norm that may be decided by a group leader or by the group members as a whole. Let's look at four common ways of making decisions in groups. To make it simple, we will again use a continuum as a way to visualize the various options groups have for making decisions. On the left side are those methods that require maximum group involvement (consensus and voting). This side is better aligned to the Conceptual and Behavioral styles. On the right are those methods that use the least amount of input from all members (compromise and authority rule). This right is better aligned to Directive or Analytical styles.



The decision-making process that requires the most group input is called **consensus**. To reach consensus *group members must participate in the crafting of a decision and agree to adopt it*. While not all members may support the decision equally, all will agree to carry it out. In individualistic cultures like the U.S., where a great deal of value is placed on independence and freedom of choice, this option can be seen by group members as desirable since no one is forced to go along with a policy or plan of action to which they are opposed. Even though this style of decision making has many advantages, it has its limitations as well—it requires a great deal of creativity, trust, communication, and time on the part of all group members. When groups have a hard time reaching consensus, they may opt for the next strategy, which does not require buy-in from all or most of the group.

Voting by majority may be as simple as having 51% of the vote for a particular decision, or it may require a larger percentage, such as two-thirds or three-fourths, before reaching a decision. Like consensus, voting is advantageous because everyone is able to have an equal say in the decision process (as long as they vote). Unlike consensus, everyone may not be satisfied with the outcome. In a simple majority, 49% of voters may be displeased and may be resistant to abide by the majority vote. In this case, the decision or policy may be difficult to carry out and implement. For example, a college campus recently had a department vote on whether or not they wanted to hire a particular person to be a professor. Three faculty voted yes for the person while two faculty voted no. Needless to say, there was a fair amount of contention among the professors who voted. Ultimately, the person being considered for the job learned about the split vote and decided that he did not want to take the job because he felt that the two people that voted no would not treat him well.

Toward the right of our continuum is **compromise**. This method often carries a positive connotation in the U.S. because it is perceived as fair since *each member gives up something, as well as gaining something*. Nevertheless, this decision-making process may not be as fair as it seems on the surface. The main reason for this has to do with what is being given up and obtained. There is nothing in a compromise that says these two factors must be equal (that may be the ideal, but it is often not the reality). For individuals or groups that feel they have gotten the unfair end of the bargain, they may be resentful and refuse to carry out the compromise. They may also foster ill will toward others in the group or engage in self-doubt for going along with the compromise in the first place. However, if groups cannot make decisions through consensus or voting, compromise may be the next best alternative.

At the far right of our continuum is decision by **authority rule**. This decision-making process *requires essentially no input from the group, although the group's participation may be necessary for implementing the decision*. The authority in question may be a member of the group who has more power than other members, such as the leader, or a person of power outside the group. While this method is obviously efficient, members are often resentful when they feel they have to follow another's orders and feel the group process was a façade and waste of valuable time.

During the decision making process, groups must be careful not to fall victim to **groupthink**. Groupthink occurs when members strive for unanimity, resulting in self-deception, forced consent, and conformity to group values and ethics (Note: Rose, Meleady, Hopthrow, Tim, Crisp, Richard J. "The Group Decision Effect: Integrative Processes and Suggestions for Implementation." *Personality and Social Psychology Review* (2012). Sage. Web.). Let's think about groupthink on a smaller, less detrimental level. Imagine you are participating in a voting process during a group meeting where everyone votes yes on a particular subject, but you want to vote no. You might feel pressured to conform to the group and vote yes for the sole purpose of unanimity, even though it goes against your individual desires.

As with leadership styles, appropriate decision making processes vary from group to group depending on context, culture, and group members. There is not a "one way fits all" approach to making group decisions. When you find yourself in a task or decision-making group, you should consider taking stock of the task at hand before deciding as a group the best ways to proceed.

Group Work and Time

By now you should recognize that working in groups and teams has many advantages. However, one issue that is of central importance to group work is time. When working in groups, time can be a source of frustration as well as a reason to work together. One obvious problem is that it takes much longer to make decisions with two or more people as opposed to just one person. Another problem is that it can be difficult to coordinate meeting times when taking into account people's busy lives of work, school, family, and other personal commitments. On the flip side, when time is limited and there are multiple tasks to accomplish, it is often more efficient to work in a group where tasks can be delegated according to resources and skills. When each member can take on certain aspects of a project, this limits the amount of work an individual would have to do if he/she were solely responsible for the project.

Tools for Communicating with Groups

Technology is rapidly changing the ways we communicate in a variety of contexts, and group communication is no exception. Many organizations use computers and cell phones as a primary way to keep groups connected given their ease of use, low cost, and asynchronous nature. In today's work place, you can use Google Docs, chat online, transfer documents back and forth, and form messages to achieve the group's goals—all without ever having to meet in person. You'll likely find yourself participating in virtual groups with people who have been brought together from a variety of geographical locations.

When groups communicate through email, threads, discussion forums, text messaging, and other asynchronous methods, they lose the ability to provide immediate feedback to other members. Also, using asynchronous communication technologies takes a great deal more time for a group to achieve its goals. In this module, as we think of groups and collaboration, we think more of two-way communication and related tools.

Nevertheless, technology is changing the ways we understand groups and participate in them. We have yet to work out all of the new standards for group participation introduced by technology. Used well, technology opens the door for new avenues of working in groups to achieve goals. Used poorly, technology can add to the many frustrations people often experience working in groups and teams.

Meeting Scheduling

Have you ever watched an email addressed to more than five people rapidly fill your email box? Probably. Imagine the one with the subject line "Can you meet Tuesday at 10? or when?" This message for internal, external or a mix of meeting attendees will rapidly fill everyone's email box and possibly use more attendee time in reading and scheduling the meeting than the meeting may actually take. In Module 9: Communicating through Technology, we discussed a variety of tools available to streamline this interaction including Doodle and Calendly.

Quick Conversations

Groups may or may not be co-located. Throughout the work day, questions come up that need simple responses and may be somewhat flexible in the time the response is needed. These tools may be one-on-one tools or group tools (i.e. text, group text). This software typically provides ways for users to chat in real time, so projects can be completed faster because users don't have to wait for other users to respond by asynchronous means like email. Do check company policy on the use of these tools. There may be issues related to intellectual property, security, and customer relations. Tools that may suit this need are tools such as or similar to the following:

- Slack
- Google Hangouts
- Webex
- MicroSoft Teams

Email

Certainly email remains an excellent tool because large numbers of people may receive the same message. Make sure you check company use of these tools, particularly when sharing sensitive information. Email was discussed further in Module 3: Written Communication.

Conferencing

Conferencing has come a long way from bridged voice calls to expensive video bridges. Now most personal computers, tablets and phones offer users voice, video and text communication. This leads to richer communications through video conferences.

In Module 9: Communicating through Technology, we discussed a variety of tools available to for audio, video, and web conferencing.

Project Management

Project management is no longer for massive construction projects. Many tracking and coordination skills are used in group communication. These management tools help keep all parties involved in a project on the same page. These tools also reduce the amount of incoming and outgoing communications, since team members have access to the status of each person's work.

MS Project is a project management software product, developed and sold by Microsoft. It is designed to assist a project manager in developing a plan, assigning resources to tasks, tracking progress, managing the budget, and analyzing workloads. The price for this software may set some back, but it is the industry standard.

Here are a few other examples of project management tools. Keep in mind that each tool has its own quirks, and it may take some trial and error to figure out what works best for your team:

- BaseCamp
- Trello
- Clubhouse
- Asana
- Teamwork

PRACTICE QUESTION

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Collaborative Writing

The term **collaborative writing** refers to projects where written works are created by multiple people together rather than individually. Collaborative writing is also an approach for teaching novice authors to write, or for experienced writers to stretch their creative potential into modes that would be less accessible to each writer operating alone.

Using collaborative writing tools on projects can provide substantial advantages, from increased commitment to the project to easier and more effective processes for collaboration. It is often the case that when users can directly contribute to an effort and feel that they've made a difference, they become more involved with and attached to the outcome of the project. The users then feel more comfortable contributing time, effort, and personal pride into the final product, resulting in a better final outcome.

Teams may select from several methods of collaborative writing. It is important that the team discuss which style they will use for their project.

- **Single Writer.** In all groups, there are those who are stronger in certain areas—such as conceptual thinking, leadership, public speaking and writing—than others. The group may elect a single individual to complete the actual composition of the document while everyone else contributes to the thinking and research that goes into it and also review, edit and possibly rewrite. This style leads to consistent voice for the document.
- **Writing by Committee.** Teams should discuss individual team skills related to conceptual thinking, organizational structure, writing skills, subject expertise and proofreading skills. Ownership of the output belongs to all, no matter how individual work steps are completed. An example of this might be found in the parallel activity of creating sales proposals. There is a sales leader for the project, but operations team members, legal team members, and others have important input to the costs and description of the proposal.
- **Multiple Writers.** Other projects are created using more of a divide and conquer method. In this style, each team member writes one or more assigned sections. This division of work is usually based on individual expertise. While expertise is important to each section, it may lead to some significant writing style complications. Final editing must consider these issues. Without a strong outline, there may be duplication or oversight in content when reviewing the entire document. The team may schedule some preliminary reviews to ensure the entire writing project is on track.

No matter how a group decides to divide labor, the outline for the document should be the first thing completed. The next step is developing the writing plan—who is writing what and how the work will be revised. Additionally, there may be a need for more team work to fill in missing components if the work requires knowledge or skills outside of the group. These discussions should have at least one member actively taking notes on the conversation to ensure all important components are included in the final document.

As the team gathers to structure the document's writing, be sure to use the team skills discussed earlier in this module: communication and conflict resolution are key to a group project's success. In many situations, the team has completed much work and research already. That feeling of "that worst is over, we only have to write it down" may cause the team to let down its team-process efforts. Writing the document can cause as much—or more—stress as reaching the conclusions. Good team member skills are still needed.

As with all team activities, working in a group takes more time than working alone. With group writing, the initial drafting may go quickly, but the coordination before writing and the review after writing requires substantial effort. The output will be better with this effort, but to achieve that success takes time. There must be time for input from all relevant parties and the time to hear input on document content and structure.

Combinations of these styles are possible. How the writing takes place should be determined by the team in considering:

- Individual writing skill
- Length of time to final product
- Expertise in subject matter

Note that writing is a separate step in the document's preparation. Other steps such as outlining and editing have similar considerations.

One thing all group writers should remember: your name is on the document indicates your ownership and agreement with all content. Your reputation is on the line, so as a group member, it is your responsibility to be engaged regardless of the role.

PRACTICE QUESTION

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Tools for Collaborative Writing

As mentioned earlier in the module, many groups are not physically located together. Collaborative writing would be nearly impossible for team members who are not co-located without the technology we have access to today. Social media and technology are changing the ways we communicate in groups. Even in co-located teams, this rich technology enhances teams' ability to produce well-written group documents.

In addition, collaborative writing tools have made it easier to design better work processes. These tools provide ways to monitor what users are contributing and when they contribute, so managers can quickly verify that assigned work is being completed. Since these tools typically provide revision tracking, it has also made data sharing simpler. Users won't have to keep track of what version is the current working revision since the software has automated that.

WIKIS

In order to write collaboratively, we need suitable tools. Wikis (such as Wikipedia) are perhaps the most evident example of collaborative writing online: they are uniquely collaborative, as their existence is based on open editing and evolving as the community contributes.

Initially collaborative writing began with a file created by one person and then emailed to the group. Each member of the team typed in the document and shared with others. This created many confusing copies of a document each of which had modest to major modifications. With significant edits, a large team, or a large document, it could be very confusing as to which was most current.

With this method, if a group is using Microsoft Word, there are several valuable features that can help. Microsoft Word has a Track Changes feature that allows each user's changes to be highlighted and noted by other contributors. Track Changes can be coupled with the feature Compare Documents to show the original document next to the edited document. Work can then be combined into a new document with components of either revision.

If this sounds time intensive and sometimes complex, it can be.

Google Docs is software that allows multiple users to work in a single document. Like Microsoft Word, individual user contributions are collected by each user. Users can look forward and backward through revisions to select the best choice for the document.

Dropbox is a piece of software designed more for file storage than for editing. However, it also allows documents to be shared across platforms. Many companies have similar shared platforms for group document creations. SharePoint is one additional example.

With any of these choices, it is important to review organizational security and sharing protocols. Group member roles related to editing should be established.

PRACTICE QUESTION

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WORKPLACE ETIQUETTE

What you'll learn to do: Discuss best practices in workplace etiquette

This module focuses on working in groups and teams. Good manners or etiquette is an underlying theme to starting interaction on the right foot. While some of the things discussed in this section may seem like common knowledge or common sense, it can be helpful to be reminded of basic manners. Additionally, there are several important reminders or lessons about working with others and attending corporate events.

LEARNING OUTCOMES

- Discuss appropriate ways to behave in a workplace
- Discuss appropriate and inappropriate conduct at company events

Interaction in the Workplace

The first and perhaps most lasting impression you make in the workplace starts with manners: how you carry yourself and how you behave. There are many cultural issues involved in discussing how to behave in the workplace. As with the rest of this course, these lessons are based on US corporate culture. If you are engaging with individuals from different countries or cultures, be sure to study up on their cultural standards. There are extensive resources available online for this information.

Attire

At a distance, initial impressions begin with attire. Are you dressed appropriately for this workplace? To "dress up" changes meaning from a Saturday night club to a place of worship to the workplace. Absent a uniform or direct corporate attire policy, look at what your boss and your boss's boss wear in the workplace. Try to dress like those people as long as it's appropriate for the job you actually do. However, do not overdo it in a manner that causes you not to fit in. If everyone at your workplace wears slacks and dress shirts, don't wear a three-piece suit!

One bit of shared wisdom is to dress like the employee you want to be with your next promotion. There are times where you may be asked to attend an event away from the usual workplace. It may even be a bit social (such as taking a customer out for a meal). It is better to ask others about appropriate attire than to show up incorrectly dressed. This skill works in individual situations and particularly well when in a group. Think of your clothing as showing respect to the other person or persons.

PRACTICE QUESTION

An interactive or media element has been excluded from this version of the text. You can view it online here: https://courses.lumenlearning.com/wmopen-businesscommunicationmgrs/?p=3204

Body Language

The second impression you make is with body language. Posture (a form of body language) communicates a lot about you. Are you standing tall with shoulders back, but not stiffly? Did you rise when someone new entered the room? Are your legs or ankles crossed? Is your head up, looking at the other person? If the answers to these questions are "yes," they identify someone ready to do the work of the day, someone who is confident.

In conversation, you should be attuned to and gently copy the body language of others you are speaking with. If the other person leans in a bit, you should consider doing so as well. If the other person is leaned back against his chair, you may do the same. Avoid copying or aping the other person's movements, but do subtly follow him or her with similar movements. This is more appropriate if the other person has organizational rank or power.

Proximity, or the space around individuals, is another very culturally tied component of body language. Start by respecting other's work spaces. Whether your co-worker is in an office or a cubicle, pause to gain permission to enter that space. Once you are in conversation range of another person, no one will produce a measuring tape to determine how close or far to stand from someone else, but there is such a thing as appropriate distance and respecting personal space. Start at a distance where you are comfortable. If you notice the person gently backing up, then you are too close. If the person either moves in, leans in to hear, or repeatedly asks you to repeat yourself, you may be too far away. If the person you are speaking with is seated, try to sit near them so as to be at the same conversational level. If this is not possible, be sure you do not stand so close so that they feel like you are looking down on them. If you are seated and the person you are conversing with is standing, offer them a seat near you or stand to be at their level.

Handshakes

Handshakes are the staple of business and professional greetings. They are another way to get off to a good start—or not. Your reputation may be made in this few second interaction. Reach with your right hand to grasp the other person's right hand. Grasp firmly but not in a manner to suggest a contest of strength. Shake hands up and down gently three to four times. As you shake, look the other individual in the eye and continue conversation. It is appropriate to make an effort to shake hands with all those in the group or immediate vicinity. With a room of 100, no one will shake hands with everyone, but do greet those close to you or those who may enter that area. If someone is injured or sick, they may opt out of shaking hands. Respect their wishes in this and just offer a friendly, "It's a pleasure to meet you." If you have a cold, you may choose not to shake hands, but you are then obligated to explain why, for example, “I’d love to shake hands, but I’m getting over a cold, and I wouldn’t want to give it to you.”

Eye Contact

Eye contact is dramatically different among different cultures. Just like the handshake, it is a part of body language that can be handled poorly. “Look at me when I’m talking to you,” is a phrase we may hear from a parent or teacher. It is true that we should look at the other person in a conversation and look in his or her eyes. Your look is directed at the other person’s eyes or the bridge of their nose. In the United States, you should look others in the eyes (top of the nose) without staring intently: glance around occasionally.

Eye contact is important if you are speaking in front of a group and when you are part of an audience. As the speaker, you are trying to engage everyone with your subject. As the audience, you are showing the speaker that you are engaged and value this input. Again, do not stare intently but keep a steady gaze.

Gestures

Gestures are another component of body language. In a business setting, gestures are somewhat contained. Avoid knocking into other people or items that are close to you. Use appropriate gestures to make your point.

Fidgeting is another gesture that may occur subconsciously. Some people tap pencils or snap rubber bands. Whatever your habit, avoid it.

Volume and Location

Volume and location of conversation are important. When you are speaking with others, use a volume that is audible to those individuals and *only* to them. You want to avoid others being forced to hear your conversation when they may be trying to have conversations of their own. Your volume will be adjusted to the situation of the conversation. Avoid cell phones around others as the volume is frequently annoying. If you must use a cell, move to a location with some privacy. Business conversations have a special need for security.

It is never appropriate, no matter what your volume, to discuss company proprietary information outside of a secure work space. If you find yourself needing to whisper, then you are in the wrong place to have that conversation.

However, just being in the office building does not make any conversation fair game. If you run in to your boss on an elevator or in the restroom, you shouldn’t try to enter into a conversation on a business topic. If your interaction with a colleague is coincidental, treat it that way with small talk. If you do have pressing matters to discuss then use that moment to inquire how to find a time to have the full conversation.

Written Communication

Professional written communication is another sign of respect for coworkers that matters to a successful career. While we’ve covered those aspects extensively in this course, this is a reminder not to let your guard down. Always do your best work because it only takes one or two careless emails or memos to leave the impression that that is how you conduct all your work.

Be on Time

Another important impression you make on others involves punctuality. In some cultures, it is appropriate and acceptable to be late to a meeting. This is not true in the United States where we say “time is money.” Persons in position of power may keep subordinates waiting. While you may not appreciate it, you’ll often have to accept a wait for the boss. Should the wait become too long (more than fifteen minutes), it may be appropriate to leave word you need to reschedule and leave. Let your company culture, the importance of the meeting, and consultation with others involved direct how you handle this situation.

Company Events

Company events can to be fun, exciting, and relaxed. Sometimes employees are rewarded with big entertainment privately or at a public venue. Customers are sometime hosted by employees at sporting events. In many situations, alcohol is served; however, remember that these events remain a workplace requirement rather than a personal experience. They deserve the same level of professionalism as your behavior in the work place.

The guidelines below are suggestions, not rigid rules for each event you attend throughout your career. When in doubt, err or the side of greater formality or respect, especially when engaging with customers or people above you in the company hierarchy. Behave in a manner that demonstrates that you are qualified for your current position and for positions well above that rank.

For each company event, make sure you understand the purpose of the event and prepare appropriately.

External Events

Some events include individuals from outside the company. These include sporting events, evenings at the theater, special meals, or other activities. When your company is hosting the event, it is your responsibility to meet and greet others who have been invited. For significant events, companies often assign company members to host specific individuals from the other organization. Employees may need to research their specific guest to recognize them and engage in appropriate conversation. Guests need to be open to meeting many of the hosting company's employees. Everyone should carry business cards to make an introduction and for use in follow-up conversations to be scheduled later.

Conversation

Conversation at business social events is not exclusively related to business. However, care must be taken not to become overly personal. The social environment helps establish a personal encounter, yet it remains a professional relationship. The employee of a hosting business interacting with a guest should work to share conversational responsibilities, with a slight focus on the guest speaking more than the employee. As with a guest you might host at your home, when your company is the host, you are responsible for the guest's comfort, which may include stowing coats, pointing out sights and amenities, or leading the conversation with interesting inquiries. As a guest, you should expect to be well-treated, but avoid taking advantage.

Without an assigned agenda, questions such as the following may kick off the conversation or fill in the lulls:

- Have you always lived in [state]?
- What brought you to work for [company]?
- Do you have any trips planned in the near future?

For specific events, such as a theater outing or a sporting event, do a bit of homework ahead of time so that you may demonstrate understanding of the event. "Yes, time trials at the Indy 500 are held for the four proceeding weekends to establish race order." Or, "this performance is a remake of the 1964 hit of the same name. Back then, Jack Cassidy played the lead and won a Tony."

If a social event is seated, then be sure to engage equally with those seated to your left, right, and possibly across the table. Lend your attention to the guests rather than your co-workers. You can visit with your co-workers at the office.

Introductions

As each person enters a conversation, introduce the new member to those in the group. Introductions are more than, "Susan, this is Renan. Renan, this is Susan." Give each person a way to enter the conversation. "Susan, this is Renan. He's head of west coast sales. Renan, this is Susan, she just joined us after graduating from college in Missouri." While the hosting organization should take the lead in introductions, that should not hold you back as host or guest.

Perhaps one of the most awkward situations is when you are the one entering an area where everyone already seems engaged with others. It may be tempting to spend time admiring the buffet, bar, or art. Remember, this is a social occasion, so you must be social. Find a likely group, stick out your hand and say, “Hi, I’m Susan from ABCo. May I get your name?” Or, “I don’t seem to know anyone here, can you help me put an end to that?” As long as you look friendly and spend the initial moments of the conversation listening attentively, you should be fine.

If your company is the hosting organization, be sure to look for guests who seem to be standing awkwardly alone and invite them into your conversation group. You are not obligated to this person for the entire event, but offer the person a way to engage. Just as you may grow tired of one person, so might that person of you. Allow the gentle excuse of wanting to greet someone else or refill a drink to release you both from the conversation. If your departure strands the other, then introduce that person to a new group before moving away. These are social events with the intent of establishing more relationships.

RISING AT THE TABLE

It may seem a bit old-fashioned to some, but it remains a sign of respect to rise when someone enters or leaves, particularly in groups that have a slightly older average age.

For example, if you are seated at a table, rise, introduce everyone and then sit back down as the new entrant does. Again, no one has to follow these suggestions as rules, but it is a tradition or custom in the United States.

The Basics

The suggestions that follow are likely well known by all, yet we occasionally overlook them as we become absorbed in our own needs.

- Leave your cell phone in your car or on silent. Do not check your phone for any reason until you are completely alone and out of sight. As either host or guest, the cell phone clues everyone else in that you have your attention elsewhere.
- Do not chew gum.

Table Manners

There are extensive guides online about table manners. This list is a summary of the bigger items that help you make a suitable first impression.

- Put your napkin in your lap once seated. If you are at a hosted event, wait for the host or hostess to place his or her napkin. As you finish the meal, casually fold your napkin and place it on the table. Never place the napkin on a used plate or return it to the table while others are eating.
- Start with dining utensils from the outside of the place setting and work your way in. For example, the smaller salad fork is far to the left. The main dinner fork is to the right of the salad fork. The dessert fork is to the right of the dinner fork or nearest your plate.
- Order items that your company would be willing to pay for or items that seem similar to that of the hosting company. A business dinner is not an opportunity for you to indulge.
- Take your first bite only after everyone is served. If this event is hosted, do not start eating until the host or hostess places his or her fork on his or her plate or takes a bite.
- Pass food to your right. If you are starting this dish, offer it to the left and then take your portion before passing.
- Ask others to pass items to you, rather than reaching in front of anyone.
- Bread is torn, not cut.
- Never speak with food in your mouth. Take small bites so the lull from question to answer is small.
- Focus less on eating and more on the guests. Second servings should be taken only when offered. Your main goal is to develop relationships; enjoy the food but remember where your focus should be.
- Do not feel required to eat food you do not care for. However, you should avoid announcing what you don’t like. Appreciate the effort in your behalf even if you do not appreciate the food item.
- If the event is a cocktail party with appetizers, you may find yourself standing while trying to balance a drink, a plate, and your napkin and utensils while also shaking hands with people you meet. Keep in mind your eating situation when choosing foods, for example, skip the slice of meat you have to cut no

matter how delicious it looks. Believe it or not, there are online resources to help you figure out this balancing act.

Alcohol and Marijuana

It is not unusual to find alcohol being served at social business events. With changes in some states' laws, it is possible that marijuana may soon make an appearance at these events. If you do not normally use either of these, do not feel obligated to use these at a business outing and definitely do not choose a business event to try them for the first time. Gently decline and avoid offering excuses, reasons, or ridicule. You can simply say "No, thank you" or ask for an alternative, such as tea.

If you do want to accept an offer, then do so. However, remember the purpose of this social interaction is to build relationships, not to start a big party. Watch your intake carefully and be sure to limit your intake to less than the host and far, far less than the legal limit.

As the hosting company, you have a certainly amount of liability for any guest indulging at the event. Be alert to employees or guest who may have over-indulged. While it may be a difficult conversation, it is better to keep guest safe than let them leave under the influence. If the event is hosted with an outside provider, perhaps the manager of that concern has a way of dealing with inebriated patrons. Ask for assistance. Never offer to drive anyone else home unless you are completely sober. As a guest or host, it is far wiser to hire third party transportation.

PRACTICE QUESTION

An interactive or media element has been excluded from this version of the text. You can view it online here: https://courses.lumenlearning.com/wmopen-businesscommunicationmgrs/?p=3204

Internal Events

Some events are for company personnel only or company personnel and a few select individuals with close relationship to the company. Like external events, these may take place at sporting events, the theater, or other outside venues. Even when the company says your are invited as an appreciation for your efforts, that does not mean you should over-indulge in any part of the event. This remains a professional work event. At these events, it is your responsibility to meet and greet the others who have been invited. Try to branch out and engage with people who are not your usual work friends. With really large events, business cards may be handy to have.

Conversation

Conversation at internal events is similar to conversation at external events. It is not exclusively related to business. However, care must be taken not to become overly personal. The social environment helps establish a personal relationship, yet it remains a professional relationship. Own your share of creating interesting conversations and helping them move along. Use similar conversation starters as recommended above.

Engage equally with those you like as well as your less preferred co-workers. You can visit close co-workers at the office.

Introductions

In some large companies, not everyone knows each other. Relish this opportunity to get to know new colleagues. Engage in introductions as discussed above.

Whether internal or external, social events can make us feel alone in a crowd. Look for individuals who appear lost or isolated and invite them into the activities. If you are feeling lost or isolated, find a discussion group to enter.

The Basics

The Basics discussed above apply to internal social engagements equally. One word of caution relates to alcohol and marijuana (when legal). It may be tempting to feel that it is okay to drink a bit more or smoke a bit more since the internal organization is "family." It is not right to excessively indulge at any company event. This remains a professional gathering. Your career takes precedence. Additionally, your company may have legal liability for its guests.

PUTTING IT TOGETHER: COLLABORATION IN AND ACROSS TEAMS

Let's look back at Pedro's team project he was working to arrange at the beginning of this module. The project is now complete. The six core team members submitted the 15-page proposal attached to an email just last evening. In two more weeks, the team will learn if they made the cut to the final round.

Pedro and all the team are thankful for each other's help in this exciting project. Being able to break the project into smaller, manageable sections by leveraging the teammates was important. Without the work of each team member, they never would have been able to collect all the data and ideas needed to create the exciting new story layout proposal. Having more hands on the project certainly was important to the submission, but more important was the expertise they each brought. Before this project, Pedro had not fully appreciated or understood the cost of heating and cooling for store products and how it routed under floors. It seemed to surprise others that coupons were now sent to customers based on past buying behavior.

Luckily, the team quickly realized that their initial plan of having a twenty-person core team made communication and decision-making far too difficult. That first meeting of twenty people calling out ideas and trying to dominate the conversation really disintegrated into a mess as the individual emails started afterward. The re-forming of the team to six core individuals with each managing a sub-group kept the power of ideas but cut down on the complexity of communication.

Pedro also learned quite a bit about his employees' passion. It turns out that enthusiasm can lead to lots of conflict as each team member advocated for his or her own ideas. It helped when they started segmenting activities around the goal to be achieved at each step. Even those who were angry could come back to focus on the group's goal over individual gain. At first, it was not intentional when various team members stepped into various roles that kept the project rolling along but it was helpful. Angel's collection of "lessons learned" during the project to turn over to future teams was a great idea. While Pedro was declared the leader, it was important to have others intentionally help bring ideas forward, track ideas, and support the emotional needs of team members.

Perhaps the most productive time of the team was in the final few weeks as the document was written. Right after the first outline was sent out for review, it became apparent that emailing a Word document of the outline would not work. Within the space of three days, it was impossible to tell which changes were incorporated and which document was most current. That was when the team started using Google Docs, as suggested by Lisa. It allowed the outline to be developed with input from the core team. With the revision marking, it was possible to look back to prior ideas so that nothing was lost and all changes were available immediately.

While the team waited for corporate's response, there was a tension in the air. Rather than let the team wallow in the stress, it was time to thank everyone for their overtime on this project. Pedro booked the large back room at a local restaurant for three hours on a Thursday night. He planned enough appetizers to almost count as dinner. Alcohol would be served along with water, tea, and strawberry lemonade. Pedro planned on making some opening thank you remarks. He even had a few simple company-branded items to provide, partially as a joke but also to convey his sincere thanks as he talked about the stories of their journey so far. This was one more bonding step for the team.

MODULE 13: SOCIAL DIVERSITY IN THE WORKPLACE

WHY IT MATTERS: SOCIAL DIVERSITY IN THE WORKPLACE

Why learn about social diversity?

America is a nation of immigrants; its first inhabitants are believed to have traveled across the Bering Straits, a land bridge connecting Asia and North America, over 15,000 years before the New World was "discovered" by Christopher Columbus in 1492. From the early days of European immigration through the present, America was viewed as the land of opportunity, a place where it's possible to transcend perceived limitations or persecution based on one's birth or beliefs. These ideas form the basis of the so-called "American dream."

However America has historically and systemically fallen short of these ideals. This nation—largely settled by immigrants seeking economic opportunity and religious freedom—is incredibly divided over issues of equality, or rather, we are divided over the debate about who should benefit from equality. From our founding to the present, there has been debate and division over the appropriate position on a range of fundamental human rights issues from slavery to suffrage, and more recently, diversity in its myriad manifestations.

Those who already benefit from the systematic inequality of our society often frame actions and policies that drive equality as a threat to our social fabric, prosperity, and stability. However, the struggle for equality is, in truth, a struggle between our ideals and our self-interest, the haves and have-nots, the past and an emergent future.

What do immigration, diversity and equality—arguably social or political matters—have to do with business? As we will see in this section, it's increasingly important—in many industries, a competitive imperative—for businesses to cultivate diversity and an inclusive culture. Equality remains the foundation of our belief in opportunity and a key factor driving engagement in our social, business and political process.

Indeed, surveys indicate that both consumers and employees expect businesses to take a stand on and be transparent in their performance relative to social diversity issues. Finally, as technology and globalization accelerate the pace of change, companies are often replacing government in shaping policy and practice with regards to diversity, equality and other issues—not only internally, but throughout their supply chain and society broadly.

It is—perpetually!—a brave new world. Let's explore it!

DIVERSITY IN THE WORKPLACE

What you'll learn to do: Define diversity and discuss its influence on the workplace

Living in a technically-curated, self-reinforcing echo chamber of media and social media, it's all too easy to assume that our world view and perception of reality is the consensus view—perhaps even the truth.

But that's a monochromatic—and inaccurate—view of our nation and of reality in general. Perhaps more importantly, it's a view that generally won't serve you well as a business professional, manager, or entrepreneur. In this section, we'll explore what diversity means in a business context and the competitive advantages and operational challenges of managing a diverse workforce.

LEARNING OUTCOMES

- Identify factors that define a diverse group of employees
- Explain the advantages of employee diversity within organizations
- Explain the challenges of employee diversity within organizations

Factors of Diversity

What do we mean by diversity? Despite the fact that it's in the top one percent of words searched on Merriam-Webster, the concept isn't as well understood as you might think. And, indeed, Wikipedia's entry on diversity is an alphabet soup of related terms that will have you retreating to the simplicity of the old standard. Even Merriam-Webster's definition feels a little loose and ill-defined:

> The condition of having or being composed of differing elements : variety; especially : the inclusion of different types of people (such as people of different races or cultures) in a group or organization

> programs intended to promote diversity in schools (Note: "Diversity." Merriam-Webster.com. Merriam-Webster, n.d. Web. 7 May 2018.)

In practice, diversity can be understood as a range of human characteristics that differ from our own or from those of the groups we belong to.

Points of difference can include a range of demographic and psychographic factors, both of which are traditionally used by marketers, researchers, and influencers to target segments of a larger population. Demographic factors describe the “who,” including traits such as age, education, gender, race/ethnicity, religion, income and profession, and marital or family status. Psychographic factors are considered the “why” (how we’re wired) and reflect our behavior, beliefs, lifestyles, and values. Other important aspects of diversity include disabilities, sexual orientation and cognitive styles. A key point to note is that there are many more possible points of difference than there are categories legally protected from discrimination.

In practice, diversity is not about meeting the letter of the law. That is to say, managing to the minimum requirements of legislation or minimizing legal exposure and the associated liability for claims of discrimination based on sex or color or some other factor is not enough. Businesses pursuing a true diversity strategy define diversity broadly and seek to leverage the possibilities of diversity across categories.

KEY TAKEAWAYS

For perspective on the composition of our labor force, see the Bureau of Labor Statistics Demographics page, a merger of employee statistics and demographic data from the Current Population Survey.

PRACTICE QUESTION

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Advantages of Employee Diversity

> While social justice, legal compliance, or maintaining industry standard employee environment protocols is typically the initial impetus behind [inclusion and diversity] efforts, many successful companies regard I&D as a source of competitive advantage, and specifically as a key enabler of growth.
>
> —McKinsey & Company. *Delivering Through Diversity*, Jan 2018.

In the workplace, employee diversity can be a source of competitive advantage. Here are a few specific advantages:

- Leveraging a cross-cultural (in the broadest sense of the word) awareness to identify opportunities and avoid blind spots
- Increasing the productivity of employees who feel valued
- Improving an organization's employer brand and, therefore, ability to recruit and retain talent
- Improving the market relevance and market value of a company/organization

APPLE'S HEALTH APP

As a case in point, consider Apple's Health App that claims to allow you to "keep tabs on a wide array of data that matters to you—from measurements of your blood pressure and blood glucose to records for your weight and reproductive health." Despite the promised capability to track reproductive health, the app was launched without a provision for monitoring menstrual cycles in what was critiqued as a stereotypical case of gender blindness. TechCrunch writer Sarah Perez summarized the disconnect, noting that menstrual tracking is a key function that "roughly half the population would expect to see included in a comprehensive health tracking app." And as Perez noted, perhaps that's not surprising given that 80 percent of Apple's engineering staff is male.

Perez concludes: "the issue with the Health app is a perfect example of how not having the right [gender] balance internally can actually impact innovations and technology developments." (Note: Perez, Sarah. "Apple Stops Ignoring Women's Health With iOS 9 HealthKit Update, Now Featuring Period Tracking," *Tech Crunch*, 09 Jun 2015. Web. 26 June 2018.) Over a year after the product's initial launch, Apple still hadn't addressed the oversight and didn't respond to *Splinter* writer **Kashmir Hill's** request for comment, prompting her to suggest that the answer to her question why there's still no period-tracking in HealthKit might be answered by the composition of the executive team: nine men and one woman.

For a financial performance view, let's consider McKinsey Consulting's research on diversity in the workplace. In a 2015 report titled *Why Diversity Matters*, McKinsey highlights the following findings, based on the composition of top management and boards:

- Companies in the top quartile for racial and ethnic diversity are 35 percent more likely to have financial returns above their respective national industry medians.
- Companies in the top quartile for gender diversity are 15 percent more likely to have financial returns above their respective national industry medians.
- Companies in the bottom quartile both for gender and for ethnicity and race are statistically less likely to achieve above-average financial returns than the average companies in the data set (that is, bottom-quartile companies are lagging rather than merely not leading).
- In the United States, there is a linear relationship between racial and ethnic diversity and better financial performance: for every ten percent increase in racial and ethnic diversity on the senior-executive team, earnings before interest and taxes (EBIT) rise 0.8 percent.
- Racial and ethnic diversity has a stronger impact on financial performance in the United States than gender diversity, perhaps because earlier efforts to increase women's representation in the top levels of business have already yielded positive results.

In their 2018 publication, *Delivering Through Diversity*, McKinsey Consulting again reported finding a "positive, statistically significant correlation between executive team diversity and financial performance." Although correlation is not causation, the report notes that "there is a real relationship between diversity and performance that has persisted over time and across geographies." (Note: McKinsey&Company. *Delivering Through Diversity*, Jan 2018. Web. 26 June 2018.) The conclusion drawn from their 2015 *Why Diversity Matters* report still applies: "diversity is a competitive differentiator shifting market share toward more diverse companies." (Note: McKinsey&Company. *Diversity Matters*, 2015. Web. 26 June 2018.)

PRACTICE QUESTION

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Challenges of Employee Diversity

The things that make us different can also make it challenging for us to work well together. These challenges are not only based on actual or perceived differences embedded in our culture or psyche but also on perceived threats to the established order. Society is (at least nominally) striving to move away from these challenges and become a more equitable place.

Figure 1. The Walls that Separate Us. *The time, place, and way we grow up shape how we view people. It's common to develop biases and avoid people who you view as very different from you. This can cause tension in the workplace.*

The issue that is less obvious and, perhaps for that reason, more pervasive, is unconscious bias. We know perception is personal and subjective; however, what we are largely unaware of is that there can be a disconnect between our conscious thoughts and our unconscious beliefs or biases, primarily a product of sociocultural conditioning. And unless we circumvent the automatic responses, the unconscious rules.

In 1998, scientists from Harvard, the University of Virginia, and the University of Washington launched "Project Implicit," a series of implicit association or social cognition tests (IAT) designed to reveal participants' unconscious (attitude and belief) biases based on demographic factors such as color, race, and sex. Briefly, an IAT measures the strength of associations between concepts (for example, gay or straight people) and judgments (good or bad) or associations (for example, joyous or tragic).

The idea behind the Implicit Association Test is that we don't always know our minds; that is, we are unaware of the divergence between our conscious attitudes and our unconscious beliefs. The divergence between the two is a blind spot and is as potentially dangerous as a blind spot when driving—on both individual and organizational levels. Thus, the goal is to raise awareness of hidden biases or blind spots so we can take action to counter our own biases.

For example, you may consciously believe that black and white individuals should be treated equally; however, your responses (and those of many others) may show that you associate black individuals with negative actions (e.g., violence and crime) more than you associated white individuals with the same actions. This association may contribute to individual decisions, a pattern of behavior, and a culture that reinforces these associations and significantly decreases the opportunities for black individuals to participate in society from a starting place equal to that of white individuals.

The Social Attitudes category of the Implicit Association Test includes a number of tests such as the things you associate with a Man-Woman pairing, an Arab Muslim-Other People pairing, and a Disabled-Abled pairing.

To take the test, visit the Project Implicit site.

If not recognized and challenged, these unconscious—and conscious—biases can become codified in the culture or a sub-culture and become a cultural norm, effectively nullifying the benefits of a group's diversity by marginalizing minority individuals or prompting industry avoidance or an exodus of certain groups away from a field, as is being seen with women in STEM (science, technology, engineering and math) occupations.

The critical problem with biases is that they undermine both an organization's brand and its strategic intent. Whether actions are conscious or not, the gap between stated attitudes and operational realities undermines market credibility and effectiveness along a continuum from recruiting to new product development. Without awareness and appropriate intervention, bias can lead to dominant group ("person like me") favoritism in selection, evaluation, project assignment, and promotion and preclude or silence the differences of opinion critical to innovation.

For additional perspective on the challenges of achieving employee diversity, watch Helen Turnbull's TED Talk titled "Inclusion, Exclusion, Illusion and Collusion." Key takeaway: "The unchallenged brain is not worth trusting."

KEY TAKEAWAYS

For additional perspective on the benefits and challenges of diversity in the workplace, explore Hult Business School's summary of diversity benefits and challenges.

PRACTICE QUESTION

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INTERCULTURAL COMMUNICATION

What you'll learn to do: Discuss how different cultures impact the workplace

One of the most fundamental ways that members of a particular culture bond and indeed perpetuate their culture and traditions is through a shared language—not only the written and spoken word but through gestures and interactions.

In this section, we will consider the concepts of race and ethnicity and the implications of culture—be it based on country, race, or religion—for effective cross-cultural business communication.

LEARNING OUTCOMES

- Compare and contrast race and ethnicity
- Discuss how cultural differences among races may influence communication
- Discuss how cultural differences among individuals from different countries may influence communication
- Discuss how cultural differences among individuals from different religions may influence communication
- Describe strategies to adapt communication for an intercultural audience

Race and Ethnicity

The concept of race has changed across cultures and eras ranging from being based on ancestral and familial ties to theorists assigning categories of race based on geographic region, ethnicity, skin color, and a wide range of other factors. These assumptions were reflected in their labels; for example, people would be categorized based on region (e.g., Chinese or German) or skin tone (e.g., black or white).

Ethnicity is a term that describes shared culture—the practices, values, and beliefs—of a group. Common cultural elements may include a shared language, religion, and traditions. Like race, ethnicity is a complex concept, and its meaning has changed over time. And as with race, individuals may be identified or self-identify with ethnicities in complex, even contradictory, ways. For example, members of ethnic groups such as Irish, Italian-American, and Russian are generally included in the "white" racial category. Conversely, the English ethnic group includes citizens from a multiplicity of racial backgrounds: including black, white, Asian, and a variety of racial combinations. These examples illustrate the complexity and overlap of these identifying terms. Ethnicity, like race, continues to be an identification method that individuals and institutions use today—whether through the census, affirmative action initiatives, nondiscrimination laws, or simply in daily interactions.

READ AND VIEW MORE

While race and ethnicity are both based on the idea of a common ancestry, there are several differences between the two concepts. Sociologist Dalton Conley, one of the experts contributing to PBS's *RACE: The Power of Illusion* project, explains the differences between race and ethnicity: "First of all, race is primarily unitary. You can only have one race, while you can claim multiple ethnic affiliations. You can identify ethnically as Irish and Polish, but you have to be essentially either black or white. The fundamental difference is that race is socially imposed and hierarchical. There is an inequality built into the system. Furthermore, you have no control over your race; it's how you're perceived by others." (Note: Conley, Dalton, John Cheng, David Freund, and Sumi Cho. "Ask the Experts: What Our Experts Say," *RACE—The Power of Illusion*, 2003. Web. 26 June 2018.)

Fellow contributor and author John Cheng draws the distinctions further, noting that ethnicity represents a choice to be a member of a group; for example, one can adopt the language, customs and culture of that ethnic group. Race is not a choice: "you either are or are not a member of [a given] race." Echoing Conley's point about the socialization of race, Cheng emphasizes that "race becomes institutionalized in a way that has profound social consequences on the members of different groups." (Note: Ibid.)

Explore aspects of race with PBS's *RACE: The Power of an Illusion* programming or watch the Khan Academy video "Demographic Structure of Society: Race and Ethnicity."

PRACTICE QUESTION

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Language, Communication, and Diverse Social Groups

Whether we realize it or not, we use language as a way to classify people into social categories, just as it is common to use physical variations like race to distinguish people. We all have an idea in our heads of what a "standard" version of a language sounds like based on how and where we grow up and our early social influences. It is easy to pick up on very small characteristics in spoken language that can differentiate it from what is considered standard.

Imagine a group of five people talking after a staff meeting. As you walk by, you overhear a snippet of their conversation. You notice all are speaking the same language together, for example English, and you are able to hear several different varieties of English at once. This means you are hearing different types of intonation, pronunciation, or regional accents. Someone's voice and language can provide information about their geographical locality, socio-economic status, and ethnicity or racial groups.

To add to the complexity of this topic, people often ascribe certain language characteristics to racial groups. Since many individuals have dual or mixed heritage, they can belong to many different language groups or varieties. For perspective on this point, watch "tri-tongued orator" Jamila Lyiscott's spoken-word essay "Broken English," presented at TEDSalon New York as "3 Ways to Speak English."

Unfortunately, people's perceived racial differences can create a type of language barrier. This can then influence how individuals communicate in the workplace. Sometimes at work people may adopt a particularly "professional" way of speaking, be it jargon or a certain level of vocabulary or elaborate coded language. This can be off-putting and sound fake to other individuals who use different ways of speaking and may find some types of "professional language" difficult to understand.

Some individuals may take the opposite approach. Especially in marketing, we see individuals using "street" language or new slang (or even memes) in an attempt to connect with their target audience. This approach almost always fails, as it is nearly impossible to correctly mimic this type of dialect. It can also alienate those targeted by these tactics by making them feel like their identities are being flattened and commodified.

Depending on racial or ethnic background, people from different groups may approach public communication in a work setting differently:

- Beliefs about what is considered polite
- Beliefs about what emotions are appropriate to be expressed in a public setting
- Beliefs about how to interact with someone if there is a large age difference
- Beliefs about how to make a request or to offer assistance in a direct or indirect manner

- Beliefs about what is considered humorous or in poor taste
- Beliefs about the appropriateness to talk about someone who is not there or to speak for someone else who is not present
- Beliefs about eye gaze or physical touch from non-family members (such as giving a hug to a co-worker if they look upset)

EXAMPLES

Consider the following scenarios of employees working at a grocery store and write your thoughts on each.

Bakery

Two associates in the bakery department have been working together for about a month. They have just started their shift after having two days off. One associate Mary, seems to have no issue sharing with her coworkers every detail about her weekend with her children. Mary asks about her coworker Jane's weekend. Jane gives a short and nondescript answer. Is Jane being rude for not disclosing much information, or is Mary sharing too many personal details to someone she barely knows?

Break Room

In the break room, several men and women are sitting around tables eating lunch. Next to the tables there is a young man, Tomas, who is sitting on a couch and looking at his phone. At the table, the conversation turns towards the monthly celebration of any employees who have birthdays that month. The young man on the couch pipes up saying "my birthday is actually today." Employees around the table express the regular "happy birthday" and congratulatory phrases. One person gets up and gives Tomas a hug. Tomas is taken aback and tries to pull away from the embrace. Is Tomas being rude for not accepting the celebratory nature of the hug, or is the coworker unaware of how people might feel about physical touch from non-family members or close acquaintances?

The three-part PBS series *Do You Speak American* provides additional perspective on the expression of the English language in America, discussing differing varieties of English ranging from A-Prefixing to Spanglish. Spanglish is an expression of both Anglo and Hispanic culture, with its fluid shifts between English and Spanish language often compared to jazz.

For more on immigration and the evolution of language, including how Spanglish compares to other languages such as Black English and Yiddish, tune in to the Ilan Stavan's "Spanglish: The Making of a New American Language" on the Drescher Center for Humanities YouTube channel.

KEY TAKEAWAYS

Generalizations about people's appearance and cultural identity help us understand where they are coming from, but it's critical to focus on understanding the individual as a person. As one of the testimonials on Nike's Equality page puts it: "I am not a color. I am not a race. I am an individual. I am me." While we may not be able to visualize or connect one-on-one with each person we communicate with, we can choose language that allows people to see themselves in the picture.

Being aware of (and respecting) differences in communication isn't the only facet of communication to consider when talking about race and ethnicity. It's also important for individuals to consider the words, both in casual conversation and in addressing others. While most individuals know not to use racial slurs, there are some unintentional slurs that people often don't realize they're using. For example, the word *jipped* (as in "I got jipped by that car salesman"), has its roots in a racial slur. (Note: Challa, Janaki. "Why Being 'Gypped' Hurts The Roma More Than It Hurts You." NPR. December 30, 2013. Accessed July 17, 2019. https://www.npr.org/sections/

codeswitch/2013/12/30/242429836/why-being-gypped-hurts-the-roma-more-than-it-hurts-you.) Above all else, listen to individuals who belong to minority groups, and if they say a word is racist or a slur, don't use that word.

PRACTICE QUESTION

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Countries

With the possible exception of math, there is no universal language. Each country—and, in some cases, regions of countries—has different languages, business practices, and social customs. What is a common or established communication behavior or business practice in the United States cannot be assumed to be appropriate behavior or communication elsewhere. And, as we will see in the next section, the expectations of other cultures can have a significant impact on how American businesses communicate and operate not only abroad but at home.

Differences in business etiquette and nonverbal communication account for the majority of culturally-related communication errors. In her "Cross-Cultural Business Etiquette" article for Chron.com, Lisa Magloff highlights the five primary areas of difference and potential miscommunication:

1. **Clothing:** managing the first impression
2. **Conversation:** appropriate business and ice-breaker conversation
3. **Greeting:** local customs and expectations, including greeting style—the distinctions that inspired the title of the best-selling guide to business etiquette and practices, *Kiss, Bow or Shake Hands*
4. **Forms of address:** level of formality and use of titles and degrees
5. **Time and Space:** interpretations of "on time," personal space, and physical contact. (Note: Magloff, Lisa. "Cross-Cultural Business Etiquette," *Chron*. Web. 26 June 2018.)

Different countries may also have different interpretations of nonverbal communication. Non-verbal communication includes gestures; body movement, including eye contact; and decorative and functional objects, from clothing and equipment to furniture and furnishings. To illustrate the differences, let's focus on gestures. The relative brevity of a gesture as communication belies its potential impact.

For many Americans, gestures are a cross-cultural communication blind spot. For example, flashing a peace sign, a benign gesture meaning "peace" or "goodbye" in the United States is perceived as insulting and a provocation in Australia, New Zealand and the UK. (Note: Tullos, Jolie. *Hand Gestures and Miscommunications*, 13 Jan 2014. Web. 26 June 2018.) Another translation failure: the thumbs up sign. In America, "thumbs up" is a positive gesture, conveying "good job!" or agreement. In a number of countries and regions including Greece, Latin America, Russia, Southern Italy, and West Africa, the thumbs up gesture is tantamount to giving a person the middle finger.

As Jolie Tullos concludes "as a form of language, a gesture can be just as if not more powerful than words themselves" [and] the miscommunication of hand gestures can be the difference between a greeting or the invitation to a fight." (Note: Ibid.)

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Religion

Religion is an area steeped in tradition and conventions, and is, therefore, fraught with potential for error for the uninitiated. For example, in the summer of 1977, Nike launched a Summer Hoops campaign to introduce a line of basketball shoes with an air logo based on stylized letters with flame detailing. When the shoes went into distribution in Saudi Arabia, the logo was questioned and modified, but not enough to avoid a backlash.

At issue: the logo was perceived to resemble the Arabic word for Allah, or God, and some Muslims considered the association with shoes specifically to be disrespectful. Facing a global Muslim boycott, Nike recalled the shoes in distribution and agreed to discontinue sales. As reported by Caryle Murphy for the *Washington Post*, "Nike's action came after weeks of negotiations with the Washington-based Council on American-Islamic Relations (CAIR), an Islamic advocacy group that had threatened to urge a boycott of Nike products by the world's 1 billion Muslims." (Note: Murphy, Caryle. "Nike Pulls Shoes that Irked Muslims." *The Washington Post*, 25 Jun 1997. Web. 26 June 2018.) A chastised Nike spokesperson acknowledged, "Our company has to be more vigilant and work more with communities on issues of sensitivity."

Fear or apprehension of the unknown is a large contributor to inadvertently creating communication barriers. This is especially common when faced with new or different spiritual beliefs and practices. Sometimes, a person may feel uncomfortable communicating with people from other religions because of assumptions about the other's beliefs and opinions. One main communication barrier stemming from religion is individuals' lack of knowledge or information about other religions and belief systems.

Due to the extensive variations in religious and spiritual beliefs, people who identify as religious or spiritual may have vastly different ideas and opinions about what constitutes appropriate life practices and behaviors. These beliefs, or discrepancy between beliefs, can impact how people communicate with one another. These beliefs include the following:

- Beliefs about what topics are appropriate to talk about
- Beliefs about what amount of physical touch by non-family members is appropriate
- Beliefs regarding what is considered appropriate clothing (this can include head coverings, wearing form fitting uniforms, etc.)
- Beliefs about time off from work to attend religious gatherings
- Beliefs about breaks for rituals, such as prayer at certain times of the day or needing a specific day off each week to go to a spiritual gathering place like a temple, mosque, or church
- Beliefs about food allowances including, but not limited to, consumption of alcohol, caffeine, cigarettes, meat or specific types of meat, and going without food or fasting for specific periods of time
- Beliefs about the role of family in personal, social, or work life

Depending on religious background, people with different spiritual beliefs and practices may approach public communication in a work setting differently as well. Here are a few language specific areas to be aware of:

- What topics may be referred to in a humorous or flippant way

- Specific words or phrases that may be prohibited, such as saying the name of a deity in an irreverent manner
- Different connotations of religious terminology or jargon
- Unfamiliar or new religious terminology and vocabulary
- Use of religiously approved communication methods. For example, some religious factions may dissuade the use of social media as a means to preserve one's modesty, to prevent access to material that would lead to impure thoughts, or to avoid potentially inappropriate conversations between non-married or unrelated individuals

If you are worried about contributing to a communication barrier or if you notice a breakdown in communication in the workplace, the way you approach it can make all of the difference. Above all, approach the situation or individual(s) with empathy, curiosity, and respect. Ask questions, define terms that are unfamiliar or understood differently, use clear language with neutral terminology, avoid jargon, and avoid judgment. Taking the time and effort to listen and learn about other's spiritual beliefs can help facilitate more open and effective communication channels.

PRACTICE QUESTION

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Culture and Communication

Culture and communication are inextricably linked, and messages can be misconstrued without an awareness of a particular cultural or subcultural context. As Richard Bucher notes in *Diversity Consciousness: Opening Our Minds to People, Cultures and Opportunities*, "Communication takes place whenever meaning is attached to a message." However, because of differences in how a message is interpreted, the intended meaning or message may not be what is received. When people attach different meanings to gestures, symbols or words, miscommunication can result, with significant financial repercussions.

In the aftermath of the Air-Allah incident, Nike Communications Manager Roy Agostino reflected "As our brand continues to expand, we have to deepen our awareness of other world communities." (Note: Jury, Louise. "Nike to trash trainers that offended Islam." *Independent*, 25 Jun 1997. Web. 26 June 2018.) The way Nike responded to this incident provides perspective on how to adapt communication for an intercultural audience. Two of the keys to effective communication—and business—are cultural awareness and respect. Although well intentioned, Nike's initial fumble was making a slight modification in the air logo design without additional testing or review. Alerted (or confronted, depending on the point of view) to the offense by CAIR, Nike attempted to do damage control and divert the Air shoe stock from "sensitive" markets. CAIR issued a demand for a total recall, referring to the proposed diversion as a cost-benefit analysis proposition that didn't show respect for Muslims and stating that the logo was offensive regardless of where the shoes were sold. Nike's subsequent actions reflected its intent to work toward the cultural awareness and engagement end Agostino identified. Timeline excerpts:

- NIKE apologized to the Islamic community for any unintentional offense to their sensibilities.
- NIKE implemented organizational changes to their design department to tighten scrutiny of logo design. Responsibility has been centralized into one department, and all graphic designs must now be approved by a design review board.

- NIKE has taken measures to raise their internal understanding of Islamic issues. Specifically:
    - Worked with CAIR to identify reference materials to include in their Design Library
    - Scheduled a discussion on Islamic imagery at their next Design Summit
    - Centralized the graphic design process to ensure those with familiarity in Islamic issues evaluate all graphic designs
    - Conducted a formal investigation into this issue, and CAIR is satisfied that no deliberate offense to the Islamic community was intended. (Note: Khan, Mas'ud Ahmed. "'Allah' on Nike Shoes," 20 Oct 2008. Web. 24 April 2018.)

Note: Although Nike was ultimately "cleared" of any ill intent by CAIR, twelve years later the perceived offense was still being heard in the court of the Internet, with agitators "calling into question the faith of people who do not then forward the email on to an x number of other Muslims." (Note: Ibid.) Perspective point: In the case of cultural relations, the sales adage "it is better to ask forgiveness than permission" does not apply.

PRACTICE QUESTION

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WORKING ACROSS GENDERS

What you'll learn to do: Discuss the how gender impacts communication in the workplace

What's in a chromosome (or two)? The difference in the pair of sex chromosomes determines whether a child is assigned female (XX) or male (XY) at birth has a significant impact on the individual's personal and professional development. It is not biology that affects our experience and expectations in the workplace (as some who would justify gender inequality would propose), but socialization, an accumulation of cultural, historical, and legal precedent that has created the gender divide in our society.

According to the Brookings Institution "large gaps remain between men and women in employment rates, the jobs they hold, the wages they earn, and their overall economic security." This is not just a women's issue. In a publication from the Hamilton Project at Brookings, the authors conclude that "barriers to workforce participation for women are stifling the growth of the U.S. economy, and that future economic success hinges on improving career prospects and working environments for all women." (Note: Burke, Alison. "10 facts about American women in the workforce." *Brookings*, 05 Dec 2017. Web. 26 June 2018.)

Over the years, gendered terms (for example, "men") have come to be interpreted more broadly; that is, as referring to both men and women, but the language is hardly inclusive. Indeed, the concept of gender as binary—that is, either female or male—may itself be an anachronism. As the traditional ideas of gender and gender identity are evolving and in order to adapt to a changing reality, the language and operating framework must change accordingly.

LEARNING OUTCOMES

- Discuss different strategies to use gender neutral language in business communication
- Compare and contrast how gender might impact communications styles

Using Gender Neutral Language

The use of gender-neutral language is now considered standard practice, incorporated in the APA (American Psychological Association) and other style guides that are the linguistic "bibles" for journalists, academics, and students. Purdue University's Online Writing Lab is an excellent writing resource; their APA Stylistics: Avoiding Bias page links to further discussion and specific recommendations for how to appropriately represent people in your writing, including sections on Disabilities, Race & Ethnicity, and Sex and Gender.

In order to achieve a more gender-inclusive end, The Writing Center at the University of North Carolina at Chapel Hill recommends focusing on three areas: gendered nouns, titles and names, and pronouns. Specific recommendations and examples:

1. **Replace gendered nouns with more neutral language.** This can be challenging, in particular when there is an established expectation or association. In updating the Star Trek franchise, writers replaced the "where no man has gone before" tagline with the more inclusive "where no one has gone before," retaining both the rhythm and promise of the iconic phrase.
2. **Choose equitable titles and names.** To illustrate, use Ms. or other appropriate title (Professor, Dr., etc.) that doesn't define a woman in terms of her relationship with a man. In both written and verbal contexts, give a woman the same respect as you would a man. For example, using both a first and last name or title and last name rather than an informal first name.
3. **Use pronouns equitably.** As mentioned above, using masculine pronouns ("he," "his," "him") as the "default" is no longer an accepted practice. Instead, consider the following options:
    - **Use more than one pronoun:** If you don't know the gender of the person the pronoun refers to, use "he or she" or her/him. Note: Be aware of your audience; using "he or she" may exclude people who do not relate to either pronoun. In that case, you may want to use a more inclusive, albeit rather lengthy, "he/she/they."
    - **Alternate genders and pronouns:** If the person being referred to could be either female or male, alternate using the masculine and feminine pronouns. Be sure to do this in a way that doesn't confuse your listener/reader by making it sound as though multiple people are involved when there's just one.
    - **Make your nouns and pronouns plural:** This sidesteps the gender issue for your audience by making it sound as if there is more than on for example, he or she becomes they.
    - **Use "they" as a singular pronoun:** Although "they" generally refers to a plural antecedent—that is, is used as a plural pronoun—it is also used as a gender-neutral pronoun. Again, know your audience.

PRACTICE QUESTION

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Are There Differences in Gender Communication?

Starting in childhood, girls and boys are generally socialized to belong to distinct cultures based on their gender and thus speak in ways particular to their own gender's rules and norms (Fivush; Hohnson; Tannen). This pattern of gendered socialization continues throughout our lives. As a result, men and women often interpret the same conversation differently. Culturally diverse ways of speaking based on gender can cause miscommunication between members of each culture or speech community. These cultural differences are seen in the simple purpose of communication.

Although gender roles are changing and gender itself is becoming a more fluid concept, traditional roles still influence our communication behaviors. For those socialized to traditional female gender norms, an important use of communication is to create and foster relational connections with other people (Johnson; Stamou). In contrast, the goal of men's communication is primarily to establish identity. This is accomplished by demonstrating independence and control and entertaining or performing for others.

Deborah Tannen, professor of linguistics and the author of multiple books on gender and language, provides the following examples of differences in men's and women's communication:

- "Men engage in report talk, women in rapport talk."
  - Report talk is used to demonstrate one's knowledge and expertise.
  - Rapport talk is used to share and cultivate relationships.
- Women request; men direct.
  - For example, in communicating a request, a female manager might say: "Could you do this by 5 PM?" A male manager would typically phrase it: "This needs to be done by 5 PM."
- Women are information focused; men are image focused.
  - For example, women are willing to ask questions to clarify understanding. Men tend to avoid asking clarifying questions in order to preserve their reputation.
- Empathy is not apology.
  - Women often use the phrase "I'm sorry" to express concern or empathy. Men tend to interpret this phrase as an acceptance of responsibility for the situation, which it is not.
- Women are judged by their appearance; men are judged by what they say and do. (Note: Bucher, Richard D. *Diversity Consciousness Opening Our Minds to People, Cultures, and Opportunities*. Pearson, 2015, p 130.)

As in all things, it's important to remember that while these differences exist between groups, all individuals will fall somewhere along a spectrum of these tendencies. Additionally, you may run into men who demonstrate more "feminine" tendencies in their speech or vice versa.

PRACTICE QUESTION

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Gender in the World

Traditional gender roles also influence how women are heard, as Tannen alluded to above. The *Oxford Handbook of Leadership and Organization* notes that the historical marginalization of women is still in practice today, with media coverage of women leaders often focusing on fashion sensibility rather than on the strength of their leadership. There is a "Catch-22" for women: "to be 'too feminine' is to risk being perceived as weak and emotional or as manipulative and devious when exercising leadership; to be 'insufficiently feminine' generally results in being labeled as masculine, abrasive or pushy." (Note: https://books.google.com/books?id=_iqTAwAAQBAJ&pg=PA735&lpg=PA735&dq=gender+bias+language+nancy+pelosi&source=bl&ots=SzNkjbkn7-&s

Thus, gender not only impacts the language we use but the language used to describe us.

Although changing demographics and social trends have begun to erode the base of white male privilege, there are still strong cultural norms that resist this change in the status quo. Additionally, the composition of executive leadership still remains predominantly white male, and organizational culture and communications are largely designed to support that dominance. We see the legacy of that dysfunction in a variety of modes, from pussy hats to the #metoo movement.

JAMES DAMORE

We see this struggle playing out at Google, where efforts to include more women in technical roles are meeting with some resistance. The conflict surfaced when James Damore, a white male engineer, posted a ten page critique of Google's diversity efforts titled "Google's Ideological Echo Chamber" on an internal discussion board. One of the most inflammatory points made was that "biological differences between men and women might explain why we don't see equal representation of women in tech and leadership." In his memo, Damore states his belief that women are better attuned to aesthetics and people rather than ideas and that this, as well as their "higher agreeableness" (versus aggressiveness) and "neuroticism," rather than sexism accounts for gender gaps. The "manifesto," as some call it, resulted in Damore being fired for violating Google's code of conduct by "advancing harmful gender stereotypes in our workplace."

Google CEO Sundar Pichai responded to the memo in a note to employees, which includes this excerpt: "To suggest a group of our colleagues have traits that make them less biologically suited to that work is offensive and not OK. It is contrary to our basic values and our Code of Conduct, which expects 'each Googler to do their utmost to create a workplace culture that is free of harassment, intimidation, bias and unlawful discrimination.'"

In a development that reflects the nation's sociopolitical polarization, it appears Damore's firing, rather than ending the issue, has turned him into what a *USA Today* writer terms a "hero of a resurgent conservative movement." Damore has since filed a lawsuit against Google, claiming the search giant discriminates against white, conservative men. In a development worth watching, Damore and David Gudeman, another former Google engineer, are being represented by Harmeet Dhillon, the Republican National Committee's committeewoman for California. Her law firm is seeking class action status for the plaintiffs.

GENDERED LANGUAGE AT PRINCETON

On the opposite end of the spectrum, Princeton University is an example of an organization that has a clear commitment to inclusivity in both policy and practice. However, it has also met with resistance in moving toward an inclusive campus. In a rather controversial 2015 memo announcing its new communication policy, Princeton drew the distinction between gendered and gender inclusive language, explaining that "gender binary is the traditional view on human gender, which does not take into consideration individuals who identify as otherwise, including and not limited to transgender, genderqueer, gender nonconforming and or intersex." In contrast, "gender-inclusive language is writing and speaking about people in a manner that does not use gender-based words." (Note: http://www.centraljersey.com/news/princeton-university-s-gender-neutral-language-guidelines-come-to-light/article_b7567958-657d-11e6-b018-438c69ef92ac.html)

Some media interpreted the guidelines as an attempt to suppress free speech. Princeton's clarification: "No words or phrases have been banned at the University, which places a high value (on) free expression." (Note: http://www.centraljersey.com/news/princeton-university-s-gender-neutral-language-guidelines-come-to-light/article_b7567958-657d-11e6-b018-438c69ef92ac.html)

Conservative factions also interpreted this statement as an attack. For example, CampusReform.org, a conservative blog, presented the college's new gender policy as another example of liberal bias and "abuse against conservatives on America's colleges and universities." In a post titled "Princeton students can choose any—or every—gender identity" the author, Matthew Penza, closed with a call for donations to support Campus Reform's "investigative journalism," stating that "College campuses are no longer bastions of higher learning. Professors indoctrinate students with their agendas. They even silence conservative students with their attempts to suppress free speech." (Note: https://www.campusreform.org/?ID=9513) For perspective, Campus Reform is a project of Leadership Institute, an organization whose mission is to teach conservative Americans how to influence policy through direct participation, activism, and leadership. (Note: https://www.leadershipinstitute.org/aboutus/)

PRACTICE QUESTION

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WORKING ACROSS ABILITIES

What you'll learn to do: Discuss the impact of disabilities in the workplace

So far in this module we have discussed cultural forms of diversity, yet in a work setting we are also exposed to individuals with varied skills, talents, and abilities. Another component of diversity in the workplace is the wide range of physical and mental abilities of people you may work with. A common misconception or view of people with disabilities focuses on what an individual may lack or cannot do. Characterizing people solely by their disabilities and perceiving them as inferior to the non-disabled can lead to social prejudice and discrimination, also known as ableism.

Our challenge in the area of disabilities is learning to transcend our perception of someone's limitations, to adopt universal design thinking and practices in order to accommodate a range of abilities, and, thereby, extend the possibilities for both individual and collective business performance.

National Disability Employment Awareness Month: *The goal of this initiative is to celebrate individuals with disabilities strengthening the workforce and to bring awareness and education concerning the issue.*

LEARNING OUTCOMES

- Discuss how various physical and mental disabilities might affect communication

> Impossible is an opinion—not a fact.
>
> —Paul Hockey

General perception and understanding of those who are different is not unlike ancient cultures' understanding of the world: flawed (i.e., the belief the world was flat) and with large areas marked "the great unknown." This is particularly the case when it comes to people with disabilities. This lack of understanding is due to a combination of factors including a lack of exposure to people with disabilities, the amorphous definition of disability, and privacy and discrimination concerns. People with disabilities are under-represented in media and entertainment—a situation that the Alliance for Inclusion in the Arts is seeking to address. The ADA (Americans with Disabilities Act) text defines an individual with a disability as a person who has a physical or mental impairment that substantially limits one or more major life activities, a person who has a history or record of such an impairment, or a person who is perceived by others as having such an impairment. Further, people with disabilities are not required to disclose their disability, and indeed, they are often advised not to—at least in the job search process. (Note: Disclosing a disability: https://www.monster.com/career-advice/article/disclose-disability-on-resume)

So how do we approach the great unknown? Let's start by considering our perceptions of people with disabilities. In the award-winning short *Different*, by Tahneek Rahman, we see two young people navigating a new relationship. The actors' perceptions and emotions are shaped and colored by what they think they see; then, like a kaleidoscope, reality changes. As you watched the film, how did you feel when you looked through the young girl's eyes as she peered through the bushes? It may have felt like you've been here before—in a situation you thought you understood, only to have your perspective shift and click into place, framing a new reality. How often do we do this with people who are wired differently or have a different range of abilities?

It's important to note that not all disabilities are visible or accompanied by obvious cognitive or processing challenges. It's possible to work with someone for a long time before you learn that they have a disability. Some disabilities can be invisible or usually unobtrusive (MS, for example, which can lay dormant and then flare up). Additionally, some mental illnesses (like ADHD or OCD) can impact a person's work, but are completely invisible.

LEARN MORE

Empathy goes a long way in bridging knowledge and communications gaps. For a start, watch one or more of the videos in Soul Pancake's *How You See Me* series.

SUMMITING MOUNT EVEREST

Perhaps our perception of ability—and disability—says more about us then it does about others. So before we discuss communication specifics, let's broaden our perspective of what's possible. Erik Weihenmayer is one of seven disabled athletes to have successfully climbed Mount Everest, the highest mountain in the world at 29,029 feet above sea level. The only blind person to summit Everest to date, Erik went on to complete the "Seven Summit" challenge, scaling the highest peaks of each of the seven continents. Erik subsequently co-founded No Barriers, a non-profit organization that helps youth, veterans, and people with disabilities achieve transformative challenges. The organization's motto: Unleash the Human Spirit.

Indian amputee Arunima Sinha is another of the seven disabled Everest summiters. In the aftermath of a train accident that severed her leg, Arunima "pondered on the most impossible dream I could set for myself. I decided to climb Everest." Erik and Arunima are remarkable athletes and people, but there are thousands of similar stories—people who, by birth or circumstance, found themselves at a relative disadvantage and yet prevailed and indeed, thrived. Clearly, they did not see their disability as a limitation. Tapping this human spirit is critical to business success in a competitive global economy.

Overcoming Communication Challenges

People with disabilities can experience unique communication challenges whether they have sensory impairments (blindness or deafness), cognitive disorders (autism spectrum disorder, post-stroke challenges), or physical disabilities (head trauma or neurological injury). In particular, some communication difficulties in the workplace can include the following:

- Difficulty speaking: speech may be unclear, interrupted by stuttering, or abnormally slow, fast or irregularly paced
- Difficulty with listening for extended periods or listening to multiple people participating in a conversation
- Difficulty reading manuals with dense amounts of text
- Difficulty keeping track of procedural material without the help of notes or hands-on experience
- Difficulty interpreting language that has implied meaning such as indirect requests or offers for help, or certain types of humor
- Difficulty interpreting body language, the emotions of others, or other non-verbal language
- Difficulty communicating with unfamiliar people; this can include eye contact

Whether individuals have disclosed a disability or not, the way you approach a communication breakdown or misunderstanding matters. If you do not understand something a person says, do not pretend that you do. Ask the individual to repeat what he or she said and then repeat it back. Try to ask questions that require only short answers or a nod of the head. Concentrate on what the person is saying and do not rush to a conclusion about what you think they mean. Do not speak for the individual or attempt to finish her or his sentences. If you are having difficulty understanding the individual, consider writing as an alternative means of communicating, but first ask whether this is acceptable.

Other things to consider are:

- If you are in a public area with many distractions, consider moving to a quiet or private location.
- Be prepared to repeat what you say, orally or in writing.

- Offer assistance completing forms or understanding written instructions and provide extra time for decision-making. Wait for the individual to accept the offer of assistance; do not "over-assist" or be patronizing.
- Be patient, flexible and supportive. Take time to understand the individual and make sure the individual understands you.

If you notice a communication breakdown or misunderstanding, it is of utmost importance to treat everyone with dignity, respect, and courtesy. Be patient, be supportive, and take as much time as necessary to listen to the individual because it can make all of the difference.

PRACTICE QUESTION

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Developing an Accessible Workplace

The Society for Human Resource Management's (SHRM) Developing an Accessible Workplace toolkit is an excellent resource, addressing the business case, physical accessibility and information accessibility. Technology accommodations might include use of large display screens, screen readers, and/or voice recognition software. In order to communicate effectively across a range of abilities, businesses also need to design materials—from onboarding and ongoing communications to training and development—with accessibility in mind. Rather than "retrofitting" materials and programs to accommodate a person's particular disability, a best practice is to use a Universal Design for Learning (UDL) approach. Briefly, UDL is a research-based educational framework that guides the development of flexible learning environments that can accommodate individual learning differences." (Note: http://www.ascd.org/Publications/Books/Overview/Teaching-Every-Student-in-the-Digital-Age.aspx) The concept and language of UDL was inspired by the universal design movement, proposing that "products and environments be designed to be usable by all people, to the greatest extent possible, without the need for adaptation or specialized design."

As with many conceptual frameworks, there are different approaches to achieving UDL. The following 7 core principles provide the framework for an online educational certification program at Saddleback College:

1. Principle 1: Inclusive & Fair
2. Principle 2: Straight-Forward & Clear
3. Principle 3: Flexible & Fair
4. Principle 4: Explicitly Presented
5. Principle 5: Supportive
6. Principle 6: Minimize Effort
7. Principle 7: Appropriate Learning Space

Delving into UDL is beyond the scope of this section and course. However, even at the summary level, these principles clearly contribute to a fair, inclusive and effective workplace. The upside is that applying the design principles also makes information more accessible to people for whom English is a second language. The clarity that the design principles require also contributes to clear communication across other diversity dimensions—for example, cultures and ethnicities.

There are also simple, practical adjustments we can make in our one-on-one interactions that will facilitate effective communication. The following eight recommendations, adapted from a toolkit for medical practitioners, are equally relevant to communicating with people with disabilities in the workplace (Heath Care for Adults with Intellectual and Developmental Disabilities):

- Allocate additional time to achieve the communication objective.
- Be aware of your tone of voice and nonverbal signals.
- Moderate your speaking pace and give the person with a disability adequate time to process and respond to what you've communicated.

- Actively confirm the person’s understanding and your own understanding of what he or she communicated.
- Focus on abilities rather than disabilities.
- Use specific rather than abstract language; for example, “bring a pen and paper” rather than “get ready for the meeting.”
- Stage conversations in areas that are relatively quiet without distracting activity or background noise.

Just as our history is not our destiny, our frame of reference doesn’t need to limit our future possibilities—individually or collectively, as a business or society. Disability rights are not only civil rights, they’re human rights—the right to strive to achieve our full potential, whatever that is. As one of the testimonials on Nike’s Equality Campaign page phrased it: “we all deserve a starting line.”

ADDITIONAL RESOURCES

- The 10 Commandments for Communicating with People with Disabilities (CA Department of Rehabilitation)
- The Language of Disability: Do’s & Don’ts – Alliance for Inclusion in the Arts
- A Guide to Disability Rights Laws
- Nike’s Equality Campaign page
- Communicating With and About People with Disabilities

WORKING ACROSS GENERATIONS

What you’ll learn to do: Discuss different strategies for talking to individuals from a different generation

We are shaped not only by our DNA but by our times. Imagine how different your priorities and values might be if your formative experience included the New Deal versus Watergate, space exploration versus the World Wide Web, WWII versus 9/11, or Civil Rights versus school shootings.

Our methods of communication—the skills we develop and the tools we use—are also a product of our times and technologies. In this section, we will explore how generational differences manifest in the workplace, both in terms of language used and preferred methods of communication.

LEARNING OUTCOMES

- Discuss the language differences found across different generations
- Discuss strategies for bridging intergenerational communication gaps

Each generation is a subculture with a sense of reality based on formative world and national events, technological innovations and socio-cultural values. To understand how that experience impacts communication, it's instructive to consider how the different generations view technology and communications media. The following examples are based on an analysis of generational differences (Note: West Midland Family Center. "Generational Differences Chart." Web. 28 Jun 2018.):

	Traditionalists	Baby Boomers	Generation X	Millennials	Generation Z
Technology is . . .	Hoover Dam	The microwave	Internet	Hand-held devices	Virtual
Communicate via . . .	Rotary phones	Touch-tone phones	Cell phones	Internet & Text	Social Media

Every generation develops expertise with communication formats and media that reflect their situational reality. For example, Traditionalists tend to have a more formal communication style, with a strict adherence to written grammatical rules and a strong cultural structure. Baby Boomers tend to prefer a more informal and collaborative approach. Gen X communications tend to be more blunt and direct: just the facts. Millennial and Gen Z communication is technology-dependent. As an Ad Council article notes, these generations are driving a truncation of the English language, shortening words (e.g., *totally* becomes *totes*) and abbreviating phrases into one or two-syllable "words," which may or may not be spoken aloud (e.g., FOMO for "fear of missing out" and TIL for "today I learned"). These clippings have their roots in texting language: a shorthand that's optimized for the communications media and immediate gratification expectations of mobile communication.

For additional perspective, see *Babbel Magazine*'s article "Jargon Watch: How To Speak Gen Z," which gives examples of words not rooted in clippings (e.g., "bop" and "flex").

TEXTING

Texting is a cross-generational trend—something that nearly all adults in America participate in. For perspective on texting, read onereach.com's "45 Texting Statistics that Prove Businesses Need To Start Taking Texting Seriously." A few excerpts, for perspective:

1. Over 80% of American adults text, making it the most common cell phone activity. (Pew Internet)
2. The average adult spends a total of 23 hours a week texting (USA Today)
3. The average Millennial exchanges an average of 67 text messages per day (Business Insider)
4. On average, Americans exchange twice as many texts as they do calls (Nielsen)

5. Only 43% of smartphone owners use their phone to make calls, but over 70% of smartphone users text (Connect Mogul)

PRACTICE QUESTION

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Bridging the Generation Gap

Each generation brings not only a frame of reference but also a set of competencies—and expectations—based on how they view the world and their place in it. The challenge for both businesses and individuals is that we now have five generations in the workforce. Differences in generational communication style and media are, effectively, language barriers. To the extent that individuals can't translate, the communication gaps are a hindrance to effective collaboration and, by extension, achievement of critical goals and objectives. The communication disconnect can also affect employee morale and productivity.

The opportunity in this situation is to leverage specific generational strengths and decrease points of friction. The best case scenario is to create a culture and opportunities that encourage cross-generational sharing and mentoring. As Nora Zelevansky wrote in a piece for Coca-Cola: "In order to master intergenerational communication, it is necessary to understand some broad generalizations about the generations and then move beyond those to connect as individuals." (Note: Zelevansky, Nora. "Bridging the Gap at Work: Improving Intergenerational Communication." *Coca Cola Journey*, 01 Dec 2014. Web. 26 June 2018.)

In a related trend, the model of talent management is changing. As discussed in a Sodexo report on 2017 Workplace Trends, we're moving to a model of shared learning, where workers of all ages contribute to each other's growth and development. (Note: Sodexo. "2017 Global Workplace Trends." Web. 26 June 2018.) Indeed, the researchers identified "intergenerational agility" as a critical aspect of the employee and employer value proposition. Business benefits of intergenerational learning include increased efficiency, productivity and competitive positioning. Two statistics that suggest the culture and communication gaps can be bridged: (Note: The Hartford. "Generations at Work." Web. 26 June 2018.)

- 90 percent of Millennials believe that Boomers bring substantial experience and knowledge to the workplace
- 93 percent of Baby Boomers believe that Millennials bring new skills and ideas to the workplace.

The diversity of the intergenerational workplace isn't just a development—it's a creative opportunity.

Professor Mariano Sánchez of the University of Granada in Spain sees the opportunity in cultivating "generational intelligence;" specifically, "organizing activities that raise generational awareness, connect generations and help them work better together—exchanging knowledge, ideas, skills and more to enhance the broad skill sets everyone needs in today's jobs." (Note: Sodexo. "2017 Global Workplace Trends Report." Web. 26 June 2018.)

According to Jason Dorsey, Millenial and Gen Z researcher and co-founder of The Center for Generational Kinetics, “The key is getting each person to recognize that everyone has different communication skills that can be harnessed to best support the organization.” (Note: Zelevansky, Nora. "Bridging the Gap at Work: Improving Intergenerational Communication." *Coca Cola Journey*, 01 Dec 2014. Web. 26 June 2018.) Incorporating multiple communication media in meetings and to facilitate ongoing discussion/collaboration allows members of different generations to share expertise and demonstrate the value of a particular medium. Selecting technology that supports multiple ways of communicating and collaborating can also leverage collective strengths and create fertile ground. For example, using a videoconferencing platform allows for participants to connect visually and participate virtually, with audio, screen sharing and recording capabilities.

PRACTICE QUESTION

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COMBATING BIAS

What you’ll learn to do: Discuss strategies for creating a functional workplace by combating biases

Our perceptions and the resulting judgments we make are prone to error. The terms we use to define our perceptions are often used without a clear understanding of the history of a particular term or the impact it has on the individuals and groups we are defining.

Understanding both the errors and the terminology creates an awareness that is a step toward creating a shared and inclusive view of reality—and possibility—in the workplace.

LEARNING OUTCOMES

- Describe the differences between stereotypes, prejudice, and discrimination
- Discuss the impact bias might have on communication in the workplace

Stereotypes, Prejudice, and Discrimination

Social perception is relative, reflecting both positive and negative impressions of people based on a range of factors. Our perceptions of people help to allow us to make decisions and snap judgments, but can also lead to biased or stereotyped conclusions. Although often used interchangeably, the terms used to describe these perception errors—stereotype, prejudice and discrimination—have different meanings and connotations.

Stereotypes are oversimplified generalizations about groups of people; stereotypes can be based on race, ethnicity, age, gender, sexual orientation—almost any characteristic. They may be positive (usually when referencing one's own group, such as when women suggest they have better soft skills), but are often negative (usually toward other groups, such as when members of a dominant racial group suggest that a minority racial group is dangerous or stupid).

In either case, the stereotype is a generalization that doesn't take individual differences into account. As novelist Chimamanda Ngozi Adichie explains in a TED Global talk titled "The Danger of a Single Story," the problem of stereotypes is not that they are wrong, but they are incomplete. Adiechie is a storyteller par excellence; with good humor and keen observation, her talk raises our awareness of everyday errors and is a powerful antidote to stereotypes.

Prejudice refers to the beliefs, thoughts, feelings, and attitudes someone holds about a group. A prejudice is not based on one's experiences; instead, it is a prejudgment, originating outside actual experience. In the 1970 documentary Eye of the Storm, Jane Elliott illustrates the way in which prejudice develops. The documentary shows how defining one category of people as superior (in this case, children with blue eyes) results in prejudice against people who are not part of the favored category.

While prejudice refers to biased thinking, **discrimination** consists of actions against a group of people. Discrimination can be based on age, race, religion, health, and other indicators. Discrimination can take many forms, from unfair housing practices to biased hiring systems. Equal Employment Opportunity legislation and enforcement by the EEOC is an attempt to prevent discrimination in the workplace. However, we can't erase discrimination from our culture just by passing laws to abolish it. As alluded to in the discussion of race, discrimination is a complex issue that relates to educational, economic, legal, and political systems in our society.

Prejudice and discrimination can overlap and intersect. One area of particular opportunity is raising awareness of unconscious bias. In a *Fast Company* article titled "How Unconscious Bias Affects Everything You Do," author Howard Ross relays a classic example of how major orchestras overcame systemic hiring bias to achieve relative gender equity. Although there were a number of contributing factors (for example, advertising auditions rather than relying on invitations only) the critical factor was implementing blind auditions where raters did not see the musicians. The critical aspect of this example is that the bias wasn't overcome until auditioners were asked to remove their shoes before entering the audition area. Prior to that, raters were still influenced in their judgement by the sound of a person's shoes (i.e., the sound of either heels or flat shoes led the raters to make a judgement about the gender of the auditioner).

Unconscious bias isn't limited to a particular industry or gender. Ross notes that "Over 1,000 studies in the past 10 years alone have conclusively shown that if you're human, you have bias, and that it impacts almost every variation of human identity: Race, gender, sexual orientation, body size, religion, accent, height, hand dominance, etc." The conclusion: "The question is not 'do we have bias?' but rather 'which are ours?'"

TRY IT

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Bias in the Workplace

When thinking about diversity in the workplace, chances are, most individuals tend to see themselves as good-intentioned, egalitarian, and fair-minded people. They certainly do not go out of their way to denigrate others. However, believing yourself to be "good" simply because you're not actively engaging in hateful behavior is an overly simplistic and, ultimately, unaware viewpoint because everyone has unconscious bias of some kind. The steps individuals take (or don't take!) to recognize and combat these unconscious biases has a direct impact on the workplace and everyday life.

It is important to be aware of how biases can affect individuals' behavior. While there are laws and regulations designed to protect against explicit and extreme bias (e.g., not hiring someone because of their race, gender, ability, or age), there are also instances when seemingly "small" things individuals say or do in the workplace can leave a long-lasting impression in employees' minds.

PRACTICE QUESTION

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Such "small" things are known as microaggressions or microinvalidations: daily forms of taken-for-granted bias and discrimination that have a real effect on people's lives. The work of anti-racism and anti-discrimination is the ongoing struggle to recognize and respond to this situation.

- Microaggressions are brief, everyday exchanges that send denigrating messages to certain individuals because of their group membership.
- Microinvalidations are characterized by communications or environmental cues that exclude, negate, or nullify the psychological thoughts, feelings, or experiential reality of certain groups.

WATCH THIS

Watch this video to see some examples of everyday microaggressions and microinvalidations. This video comes from Derald Wing Sue, Professor of Psychology and Education at Columbia University, and his book titled *Microaggressions in Everyday Life: Race, Gender and Sexual Orientation.*

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This video illustrates examples of microaggressions that real people have experienced. After watching this video, you may have realized you have experienced one or more of these examples. These small slights aren't just "in your head," and it can feel like a relief that there is a term for this experience. Microaggressions are, by nature, hurtful and boundary-crossing. The statements and nonverbal communication from the video make an assumption about the history, identity, body, or community of the person holding the sign. A microaggression might also be distressing to another person in the room who may be overhearing the remark.

If you are the target of, or observe, a microaggression, you are not responsible for solving the problem unless you wish to take on that responsibility. But actions you might take to help management and other employees take responsibility could include:

- Having a private conversation with a friend, team lead, or other manager about how to bring a problematic or hurtful dynamic up with the individual expressing the microaggression.
- Describing to your superior what happened and asking to talk about it at a meeting or in a memo.
- If you are a bystander, you might talk to the team lead or manager. You might also take the person who committed the microaggression aside privately and share your perspective on what you saw and heard. Ask them how what they wanted to say could have been conveyed differently and more effectively. Encourage them to apologize if it is appropriate.

Our differences from each other are important and worth addressing because they allow us to deepen our conversations and share perspectives that may vary according to our national, racial, gender, or class identity. Very often, a microaggression is seen by the perpetrator as a compliment, a statement about someone not in the room, or as an expression of desire to be more familiar than the actual relationship with the person would support. Most importantly, a microaggression, because it reflects a biased attitude towards a whole group, may make it more difficult for members of that group to learn, be in the classroom space, or speak their minds. Reducing or eliminating microaggressions, and responding appropriately when one occurs, is everyone's responsibility, and we can do it while still preserving academic freedom and insisting on everyone's right to speak openly and frankly. On the other hand, we shouldn't be afraid to talk to each other, and even prior to friendship, we want to understand where people are coming from.

WHAT CAN I DO?

If microaggressions are, as the definition says, often unintentional, can we be intentional and reduce them? Here are some things to keep in mind that might shape our intentions:

- Don’t assume you know anything about a person, what they think or what they know, by what you see on the surface.
- You are not entitled to comment on a person’s appearance, body, or presumed identity, unless your opinion is solicited.
- Wait for an invitation to ask a personal question, and remember that some people might classify a question as personal that you would be happy to answer yourself. If you want to be productively curious, disclose something about yourself and see if the person reciprocates. If not, let it go.
- Touching people presumes familiarity and should be preceded by an invitation to be touched. Compliment someone’s fashion sense, or ask them where they get their hair cut if you need a haircut, but keep your hands to yourself.
- At work, be specific in your observations about social differences, preferably with evidence drawn from the current workforce at your work location. Make sure you are expressing an informed opinion, not a misinformed opinion.

Impact of Bias in the Workplace

Given that we all have perception errors, what’s the impact of these errors on communication in the workplace? Unchecked, bias creates language, policies, operating procedures, and myriad other communications that inhibit the development of an inclusive culture. In an article titled “Perception Is Reality When It Comes to Women in the Workforce,” the author cites a study showing that language (in this case, the gender interpretation of names) can also lead to discrimination and that discrimination can be perpetrated by both men and women.

For a best practices regarding diversity and inclusion, understanding and mitigating the impact of unconscious bias is now considered an essential twenty-first century leadership skill. To help develop this skill, Catalyst, a research and women’s equity advocacy organization, has teamed with massive open online course (MOOC) provider edX to deliver a free, self-paced training: Unconscious Bias: From Awareness to Action.

PRACTICE QUESTION

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PUTTING IT TOGETHER: SOCIAL DIVERSITY IN THE WORKPLACE

Communication is invention: through our language, our imagery, our operating policies and practices, we construct reality. As is true of every other period of history, the standards of society and our nation are changing. The key question is what we want those standards to be and how we should arrive at a shared construct of that reality.

Let's return to Nike for an example of prioritizing diversity—in word and deed. Nike considers diversity a key to maintaining creativity and innovation. Its stated mission: unleash human potential; it's position: diversity unleashes innovation. To quote from their website: "Diversity is about acknowledging and valuing our differences and appreciating that everyone brings unique experiences, perspectives and ideas to the team. We want everyone who joins our team to realize their full potential." (Note: Nike. *Our Approach to Diversity and Inclusion*. Web. 26 June 2018.)

To put that belief into practice, the company surveyed employees world-wide. Using that input, Nike identified 4 core themes (Note: Miller, Makayla. *Nike's Diversity Program*. 03 Feb 2014. Web. 26 June 2018.):

1. Diversity drives recruitment of the most dynamic people.
2. Diversity enriches the creativity and innovation that shapes the brand.
3. Diversity grows our competitive advantage
4. Diversity heightens the statuture and belief in the brand within our culturally diverse customer base.

Nike has also assumed an advocacy role in terms of diversity and inclusion in society. In 2017, Nike launched an Equality campaign in an effort to inspire athletes—and fans—to take the fairness and respect they see on the court, pitch, playing field and other sporting venues to translate them off the field. (Note: O'Brien, Kyle. "Nike's 'Equality' campaign takes a stance on diversity and opportunity." Business Insider, 13 Feb 2017. Web. 26 June 2018.)

Despite the odds, Nike is "winning" in its quest for equality. In fiscal year 2014–2015, minorities became the majority of US staff. (Note: Kell, John. "Majority of Nike's U.S. Employees Are Minorities For the First Time." *Fortune*, 12 May 2016. Web. 26 June 2018.) The employee gender split is essentially even, with women compromising 48 percent of Nike's global workforce. Additionally, women's representation in management is currently at 41 percent.

But if we learned anything in this module, it's that diversity—linguistics aside—is a verb; that is, action is required. While progress is exciting and encouraging, it's important to keep in mind that diversity is still a struggle in our society. And, to this point, Nike (as well as Google and others) will remain a work in progress. CNBC recently reported on the exit of Nike's Vice President of Diversity & Inclusion "amid efforts to reform workplace culture" and an internal memo written by Nike's Chief Human Resources Office stating that the company "failed to gain traction" in hiring and promoting more women and minorities to senior-level positions. (Note: Zhao, Helen. "Nike's VP of diversity leaves amid efforts to reform workplace culture." *CNBC*, 16 Apr 2018. Web. 26 June 2018.)

LEARN MORE

For additional perspective on creating a functional workplace, read the First Round article.

MODULE 14: FINDING A JOB

WHY IT MATTERS: FINDING A JOB

Why learn to network and apply for jobs?

Nadine had worked as a manager at the local grocery store while attending college, working towards graduating from university with a BA in business. She appreciated the store's support during her years of employment as the company allowed her to work around her class schedules. However, she did not anticipate making this her life-long job—or even her first long-term career job. With her degree and experience, Nadine was ready to jump to a larger employer with greater opportunities and variety.

Despite knowing that she wanted to move on, Nadine wasn't sure where exactly she wanted to go—or how exactly she would go about finding that career job with a bigger company. If she couldn't say exactly what it was she was thinking about doing, she was going to end up staying at the local store by default.

Nadine knew that if she wanted to move on in her career, she needed to make a plan; take stock of her goals, her years of experience, and her degree; and turn her knowledge and qualifications into actions.

PROFESSIONAL SKILL BUILDING

What you'll learn to do: Discuss how to gain skills necessary for professional life

There is no doubt that a huge percent of life is spent at work. If you were to work forty hours a week and live to seventy years old, thirty-five percent of total waking hours of your life would be spent at work. (Note: ReviseSociology. "What Percentage of Your Life Will You Spend at Work?" *ReviseSociology.com.* 16 Aug 2016. Web. 10 July 2018.) Considering how much time is spent in a work environment, you want to be sure you have the right skills and mindset to make the difference between "going to work" and "having a career." This module discusses ways to develop and demonstrate skills for an enjoyable career. To start the discussion, the module examines career skills, transferable skills, and new skills to be acquired.

LEARNING OUTCOME

- List specific skills that will be necessary for your career path
- List transferable skills that will be valuable for any career path
- Explain how to acquire necessary skills, both in and out of class, for your career goals
- Describe the stages of career development

Skills for a Career

If you lived and worked in colonial times in the United States, what skills would you need to be gainfully employed? What kind of person would your employer want you to be? And how different would your skills and aptitudes be then compared with today?

Many industries that developed during the 1600s–1700s, such as health care, publishing, manufacturing, construction, finance, and farming, are still with us today. And the professional abilities, aptitudes, and values required in those industries are many of the same ones employers seek today.

For example, in the health care field then, just like today, employers looked for professionals with scientific acumen, active listening skills, a service orientation, oral comprehension abilities, and teamwork skills. And in the financial field then, just like today, employers looked for economics and accounting skills, mathematical reasoning skills, clerical and administrative skills, and deductive reasoning.

Why is it that with the passage of time and all the changes in the work world, some skills remain unchanged (or little changed)?

The answer might lie in the fact there are are two main types of skills that employers look for: hard skills and soft skills.

- **Hard skills** are concrete or objective abilities that you learn and perhaps have mastered. They are skills you can objectively claim, like using a computer, speaking a foreign language, or operating a machine. You might earn a certificate, a college degree, or other credentials that attest to your hard-skill competencies. Obviously, because of changes in technology, the hard skills required by industries today are vastly different from those required centuries ago.
- **Soft skills**, on the other hand, are subjective skills that have changed very little over time. Such skills might pertain to the way you relate to people, or the way you think, or the ways in which you behave—for example, listening attentively, working well in groups, and speaking clearly. Soft skills are sometimes also called "transferable skills" because you can easily transfer them from job to job or profession to profession without much training. Indeed, if you had a time machine, you could likely transfer your soft skills from one time period to another! Though it is important to remember that while soft skills are broadly consistent even from centuries ago, the specific execution of them requires continuous learning and recalibrating—especially as the workplace diversifies.

What Employers Want in an Employee

Employers want individuals who have the necessary hard and soft skills to do the job well and adapt to changes in the workplace. Soft skills may be especially in demand today because employers are generally equipped to train new employees in a hard skill—by training them to use new computer software, for instance—but it's much more difficult to teach an employee a soft skill such as developing rapport with coworkers or knowing how to manage conflict. An employer might rather hire an inexperienced worker who can pay close attention to details than an experienced worker who might cause problems on a work team.

In this section, we look at ways of identifying and building particular hard and soft skills that will be necessary for your career path. We also explain how to use your time and resources wisely to acquire critical skills for your career goals.

PRACTICE QUESTION

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Transferable Skills

Transferable (soft) skills may be used in multiple professions. In looking at this page for transferable skills, which are largely soft skills, start to think about the ones that apply to you and that you might refer to in your employment documents or employment conversations.

They include, but are by no means limited to, skills listed below:

Dependable and punctual (showing up on time, ready to work, not being a liability)	Self-motivated	Enthusiastic
Willing to learn (lifelong learner)	Committed	A good problem solver
Adaptable (willing to change and take on new challenges)	Strong in customer service skills	A team player
Good in essential work skills (following instructions, possessing critical thinking skills, knowing limits)	Positive attitude	Strong communication skills
Able to accept constructive criticism	Ethical	Safety-conscious
Strong in time management	Honest	

These skills are transferable because they are positive attributes that are invaluable in practically any kind of work. They also do not require much training from an employer—you have them already and take them with you wherever you go. Soft skills are a big part of your "total me" package. This is not to suggest that either you're born with these skills or you're not. Each of the skills listed above is different, and you will be stronger in some than in others. In addition, soft skills can be worked on and improved, and there are lots of resources to help develop them. Think of each soft skill like playing a sport—tennis, for example. Some people are inherently athletic and will pick up a racket and play well from their first time on a court. Other people will need lessons and lots of practice, but eventually, they can build up to a solid game—and have fun playing as well.

So, identify the soft skills that show you off the best, and identify the ones that prospective employers are looking for. By comparing both sets, you can more directly gear your job search to your strongest professional qualities.

PRACTICE QUESTION

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10 Top Skills You Need to Get a Job When You Graduate

The following video summarizes the ten top skills that the Target corporation believes will get you a job when you graduate.You can read a transcript of the video here. As you watch this video, begin to think about which of these skills you might have and how you will demonstrate them to a potential employer in your application documents and interviews.

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How to Find a New Job–Transferable Job Skills

If you are an international student, or if English is not your first language, the following video may especially appeal to you. It covers similar information to the *10 Top Skills* video above. Discover how to find a new job more easily by learning how to identify and describe your transferable job skills in English.

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Remember, no one person is perfect for any job. Everyone has areas to emphasize and to de-emphasize.

LEARN MORE

For more extensive exploration of your skills check out the following sources:

- This checklist of transferable skills from Community Employment Services in Woodstock, Ontario.
- This article from Princeton University on Transferable Skills including interpersonal, organizational, leadership, communication skills.
- The My Skills My Future skills matcher, which asks you for a past or current job and finds jobs with similar skills.
- Careeronestop.org, which is (as it says in the name) your one stop for career exploration.

Acquiring Necessary Skills

"Lifelong learning" is a buzz phrase in the twenty-first century because we are awash in new technology and information all the time. Those who know *how to learn*, continuously, are in the best position to keep up and take advantage of these changes. Think of all the information resources around you: colleges and universities, libraries, the Internet, videos, games, books, films—the list goes on.

With these resources at your disposal, how can you best position yourself for lifelong learning and a strong, viable career? Which hard and soft skills are most important? What are employers really looking for?

The following list was inspired by the remarks of Mark Atwood, director of open-source engagement at Hewlett-Packard Enterprise. It contains excellent practical advice.

- **Learn how to write clearly.** After you've written something, have people edit it. Then rewrite it, taking into account the feedback you received. Write all the time.
- **Learn how to speak.** Speak clearly on the phone and in person. For more on clear, purposeful speaking, see Module 7: Public Speaking.
- **Be reachable.** Publish your email address on your résumé, website, and social media profiles so that people can contact you. Don't worry about spam.
- **Learn about computers and computing**, even if you aren't gearing up for a career in information technology. Learn something entirely new every six to twelve months. This doesn't have to be expensive, there are free and low-cost resources online.
- **Build relationships within your community.** Use tools like Meetup.com and search for clubs at local schools, libraries, and community centers. Then seek out relevant, interesting people around the country and world. Learn about them and their projects first by searching the Internet. The more you sound well-informed, curious, intelligent, and polite, the more likely you are to get a positive response.
- **Attend conferences and events.** This is a great way to network with people and meet them face-to-face.
- **Find a project and make your mark.** This can include anything from editing a Wikipedia page, to answering questions on a discussion forum on a topic you are passionate about, to volunteering in person for a project related to your career.
- **Collaborate with people** all over the world.
- **Keep your LinkedIn profile and social media profiles up-to-date.** Be findable.
- **Keep learning.** Skills will often beat smarts. Be sure to schedule time for learning and having fun!

PRACTICE QUESTION

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Just Get Involved

After you've networked with enough people and built up your reputation, your peers can connect you with job openings that may be a good fit for your skills. The video, below, from Monash University in Australia offers the following tips:

1. Get involved in part-time work
2. Get involved in extracurricular activities
3. Get involved with employment and career development

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Have a Formal Learning Plan

Schools and employers offer a wide variety of ways to learn or enhance soft and hard skills. You are in a class now. That demonstrates specific intent toward improving skills in a formal fashion. There are other formal ways to acquire skills:

- Enroll in a credit or non-credit class
  - Many know about four-year colleges with Bachelors degrees and sometimes high costs, but there are also two-year colleges with Associates degrees and lower costs. What many miss out on are the Continuing Education classes taught at colleges or community colleges. These are frequently very affordable and allow the learner to focus on an entry-level skill in a specific area. Most degree programs provide hard skills and some training in the soft skills.
- Find an apprenticeship
  - Apprenticeships can range from highly structured to relatively loosely structured. The employer may bring someone in from the outside or work with internal employees to blend coursework with on-the-job training. Often these programs end in full-time employment or advancement. Apprenticeships directly impact hard skills and some training in the soft skills.
- Apply for an internship
  - Internships are shorter-term working relationships frequently offered in conjunction with credit from a college. While internships may be paid or unpaid, they focus on giving the employee new skills. Some of these arrangements are not well structured, so the employee must reach agreement with the employer about the skills to be earned in exchange for their valuable labor. Internships directly impact hard skills and some training in the soft skills.

Stages of Career Development

Career experts say that people will change careers (not to mention jobs) five to seven times in a lifetime, so your career will likely not be a straight and narrow path. Be sure to set goals and assess your interests, skills, and values often.

In thinking about the values one finds in a career, there is the value of what the outcome is and the value of the way it is achieved. In searching for the right career, the employer match is better when both are aligned.

Various experts break down the broad phases of a career with different labels. Let's start with this interview with Brian Fetherstonhaugh from *Forbes* magazine. It helps us start to think about what phase of a career we are in while offering a reminder of how we will help others with their progression.

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To pull career development in for closer examination, here are some more bite-size thoughts about the stages of a career. This is good to think about as we examine how to best benefit from the first growing stage of choosing a career.

See if you can remember a time in your childhood when you noticed somebody doing professional work. Maybe a nurse or doctor, dressed in a lab coat, was listening to your heartbeat. Maybe a worker at a construction site, decked in a hard hat, was operating noisy machinery. Maybe a cashier at the checkout line in a grocery store was busily scanning bar codes. Each day in your young life you could have seen a hundred people doing various jobs. Surely some of the experiences drew your interest and appealed to your imagination.

If you can recall any such times, those are moments from the beginning stage of your career development.

What exactly is career development? It's a lifelong process in which we become aware of, interested in, knowledgeable about, and skilled in a career. It's a key part of human development as our identities forms and our lives unfold.

There are five main stages of career development. Each stage correlates with attitudes, behaviors, and relationships we all tend to have at that point and age. As we progress through each stage and reach the milestones identified, we prepare to move on to the next one.

Which stage of career development do you feel you are in currently? Think about each stage. What challenges are you facing now? Where are you headed?

#	STAGE	DESCRIPTION
1	GROWING	This is a time in early years (4–13 years old) when you begin to have a sense about the future. You begin to realize that your participation in the world is related to being able to do certain tasks and accomplish certain goals.
2	EXPLORING	This period begins when you are a teenager, and it extends into your mid-twenties. In this stage you find that you have specific interests and aptitudes. You are aware of your inclinations to perform and learn about some subjects more than others. You may try out jobs in your community or at your school. You may begin to explore a specific career. At this stage, you have some detailed “data points” about careers, which will guide you in certain directions.
3	ESTABLISHING	This period covers your mid-twenties through mid-forties. By now you are selecting or entering a field you consider suitable, and you are exploring job opportunities that will be stable. You are also looking for upward growth, so you may be thinking about an advanced degree.
4	MAINTAINING	This stage is typical for people in their mid-forties to mid-sixties. You may be in an upward pattern of learning new skills and staying engaged. But you might also be merely “coasting and cruising” or even feeling stagnant. You may be taking stock of what you’ve accomplished and where you still want to go.
5	REINVENTING	In your mid-sixties, you are likely transitioning into retirement. But retirement in our technologically advanced world can be just the beginning of a new career or pursuit—a time when you can reinvent yourself. There are many new interests to pursue, including teaching others what you’ve learned, volunteering, starting online businesses, consulting, etc.

Keep in mind that your career-development path is personal to you, and you may not fit neatly into the categories described above. Perhaps your socioeconomic background changes how you fit into the schema. Perhaps your physical and mental abilities affect how you define the idea of a “career.” And for everyone, too, there are factors of chance that can’t be predicted or anticipated. You are unique, and your career path can only be developed by you.

PRACTICE QUESTION

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Career Support

Career Development Office on Campus

Whether you are a student, a graduate, or even an employer, you can obtain invaluable career development assistance at your college or university. Campus career centers can support, guide, and empower you in every step of the career development process, from initial planning to achieving lifelong career satisfaction.

Many colleges open their career centers to current students or alumni.

Books on Career Development

Going to college or taking courses for a certificate program is one of the best steps you can take to prepare for a career. But soon-to-be or recently graduated students are not necessarily guaranteed jobs. Staying educated about strategies for developing your career and finding new jobs will help you manage ongoing transitions. The book *The Secret to Getting a Job After College: Marketing Tactics to Turn Degrees into Dollars*, by Larry Chiagouris, was written specifically to help recent grads increase their chances of finding a job right after college. It speaks to students in all majors and provides tips and tactics to attract the attention of an employer and successfully compete with other candidates to get the job you want.

The following video provides an introduction to the book. You can download a transcript of the video here.

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Career Roadmap

You can use the Career Roadmap, from DePaul University, to evaluate where you are and where you want to be in your career/careers. It can help you decide if you want to change career paths and can guide you in searching for a new job. The road map identifies the following four cyclical steps:

1. Know yourself
2. Explore and choose options
3. Gain knowledge and experience
4. Put it all together: the job search process

Internet Sites for Career Planning

There are many excellent, free resources available.

Visit the Internet Sites for Career Planning Web site at the National Career Development Association's site. You will find extensive, definitive, and frequently updated information on a wealth of topics there. What is fun and helpful are the number of self-assessment activities offered.

Paid Agencies

As with all tasks in life, one may always pay a career placement firm or counselor for advice and support. These services will take time to evaluate and then require payment. In many instances, the same answers may be obtained from the other options listed here.

NETWORKING

What you'll learn to do: Discuss the importance of networking, and identify strategies to increase your professional network

Have you ever heard someone say, "He just got hired because his sister knows the manager"? That probably was not the *only* reason, but if you were the hiring manager and had to decide among three candidates that seemed to have pretty much the same strengths with only a few weaknesses, wouldn't you break the tie based on the opinion of someone you knew and trusted?

These sorts of connections don't have to be based solely on personal relationships, however. You can forge your own professional network by getting out there and getting to know others in your field. Let's learn more about this important career skill.

LEARNING OUTCOME

- Identify strategies for networking

In the context of career development, networking is the process by which people build relationships with one another for the purpose of helping each other achieve professional goals.

When you network, you exchange information:

- You may share business cards, résumés, cover letters, job-seeking strategies, leads about open jobs, information about companies and organizations, and information about a specific field.
- You might also share information about meet-up groups, conferences, special events, technology tools, and social media.
- You might also solicit job "headhunters," career counselors, career centers, career coaches, alumni associations, family members, friends, acquaintances, and vendors.

Networking can occur anywhere and at any time. In fact, your network expands with each new relationship you establish. And the networking strategies you can employ are nearly limitless. With imagination and ingenuity, your networking can be highly successful.

How to Get Started

We live in a social world. Almost everywhere you go and anything you do professionally involves connecting with people. It stands to reason that finding a new job and advancing your career entails building relationships with these people. Truly, the most effective way to find a new job is to network, network, and network some more.

Once you acknowledge the value of networking, the challenge is figuring out how to do it. What is your first step? Whom do you contact? What do you say? How long will it take? Where do you concentrate efforts? How do you know if your investments will pay off?

For every question you may ask, a range of strategies can be used. In the video *Networking Tips for College Students and Young People*, Hank Blank recommends the following eight modern and no-nonsense strategies: (Note: Blank, Hank. *Networking Tips for College Students and Young People,* https://youtu.be/TDVstonPPP8*.* Web. 10 July 2018.)

1. **Hope is not a plan.** Turning new or old acquaintances into your career network is not using people. It is what you do when your friend wants to supplement income by walking dogs and then your cousins mother goes to Aruba and needs a dog walker for two weeks. You could not do this without knowing about each of these people's needs, so share your needs. Have a plan for who you would like to know.
2. **Keenly focus your activities on getting a job. Use all tools available to you.** An acquaintance does sound like someone you met a friend's party last weekend, but acquaintances are much more than that as you grow your network. Start with friends, but then move to very directed activities. Perhaps you are hoping to work for the new hospital that is being built down the street. Have you considered attending a hospital fundraiser or volunteering at the Information Desk? With both of these activities, you help the hospital while increasing your odds of meeting someone new who will value your skills and refer you along. This section talks more about the many ways you might develop your network.
3. **You need business cards.** Have you done the thing where you share information by tapping phones? Maybe you have friended someone to share contact information. Remember that you want to stand out and be easy to find as you build your network. Use all your tools, and one important tools is the business card. Given a lifetime of work, it's inexpensive and easy to create a business card on nice card stock. Several online services allow you to create a card to your specifications and then order as few as 250. Sharing a card does not require technology, which is an added benefit. A really nice feature of these cards is that with a few pen strokes, you may add a personal note to help your new acquaintance remember who you are and where you hope to be.
4. **Register your own domain name.** While this networking idea may be a stretch, why not? In some industries (especially creative fields that require an up-to-date portfolio) this might be a must and for the rest of us, who knows what the future may bring as we try to stay on the top of others' minds. If you cannot register for a domain name, you should at the very least claim an email (and social media accounts) that clearly reminds others of your name (e.g., Connie.Lynch@email.com or @connielynchmarketing).
5. **Attend networking events.** Many networking events do not charge at all. Some start with your membership in an organization or an invitation by a member. If this is your area of work or career, why wait to join? These are your people doing what you want to do.
6. **Master LinkedIn because that is what human resource departments use.** These tips are "for students," but all career people are aware of LinkedIn. It is a recommended site, but chose based on your needs and comfort level. See the LinkedIn for Students website.
7. **Think of your parents' friends as databases.** Perhaps many of us were eager to step into independence from our parents as we move into our own homes and have our own families. We might wonder how that "other" generation can understand us and our needs. Networking is about sharing with all based on the assumption that as we help others, they will help us. Who might be the most willing to help us? Family. Surprisingly parents (children, cousins) have relatives who work at interesting places. Besides, who is most likely to brag about you?
8. **Create the world you want to occupy in the future by creating it today through your networking activity.** Much of networking seems about "who can help me." It is important not to be a user but

to be a person others want to know. For example, if you're a real estate agent, you may suffer through many networking events where you want to flee after hearing that no one has any intent to move. However, you must realize that networking is not about what someone *does* for you but about getting to know one and other. As you make yourself memorable and become a good resource for others, they will remember you and put you together with appropriate opportunities when they arise. You never know when your business card will float up from the bottom of someone's briefcase just at the moment your particular skills are called for.

A CAUTION FOR NETWORKING

Networking should never be thought of as "what they can do for me?" Networking is two-way business relationships. Listen to others and offer help where you can. It is rare that the one you ask for help or advice has just the answer you need. That one you just asked may know someone who knows someone. As you listen, see where you may help others.

Sources for Developing Professional Networks

The bottom line with developing professional networks is to cull information from as many sources as possible and use that information in creative ways to advance your career opportunities. The strategies listed in the section above provide you with a comprehensive set of suggestions. Below is a summary of sources you can use to network your way to career success:

Meet-up groups	Conferences	Special events	Technology tools
Social media	Career centers	Alumni association	Professional organizations
Volunteer organizations	Internships	Part-time job	Job club
Networking events	Magazine articles	Web sites	Career coaches
Headhunters	Career counselors	Family members	Family members
Coworkers	Vendors	College professors	Advisers
Classmates	Administrators	Coaches	Guest speakers

PRACTICE QUESTION

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RÉSUMÉS AND COVER LETTERS

What you'll learn to do: Produce a résumé and a cover letter

A résumé and a cover letter are two essential documents for a job hunt. While neither one will necessarily get you that job on its own, you won't even make it to the interview with out them. These documents are important marketing materials for the product: you.

LEARNING OUTCOMES

- Discuss the purpose and contents of a résumé
- Identify characteristics of an effective résumé
- Create a résumé customized for a specific job opening
- Identify characteristics of an effective cover letter

The Purpose of Résumés

A résumé is your first introduction to a potential employer. It is a written picture of who you are—it's a marketing tool, a selling tool, and a promotion of you as an ideal candidate for any job you may be interested in.

The word résumé comes from the French word *résumé*, which means "a summary." Leonardo da Vinci is credited with writing one of the first known résumés, although it was more of a letter that outlined his credentials for a potential employer, Ludovico Sforza. The résumé got da Vinci the job, though, and Sforza became a longtime patron of da Vinci and later commissioned him to paint *The Last Supper*. You can see the letter and read the translation at Leonardo da Vinci's Handwritten Resume (1482)

Résumés and cover letters work together to represent you in the brightest light to prospective employers. With a well-composed résumé and cover letter, you stand out—which may get you an interview and then a good shot at landing a job.

In this section, we discuss résumés and cover letters as key components of your career development tool kit. We explore some of the many ways you can design and develop them for the greatest impact in your job search.

Your Résumé: Purpose and Contents

Your résumé is an inventory of your education, work experience, job-related skills, accomplishments, volunteer history, internships, residencies, and more. It's a professional autobiography in outline form to give the person who reads it a quick, general idea of who you are. With a better idea of who your are, prospective employers can see how well you might contribute to their workplace.

As a college student or recent graduate, you may be unsure about what to put in your résumé, especially if you don't have much employment history. Still, employers don't expect recent grads to have significant work experience. And even with little work experience, you may still have a host of worthy accomplishments to include. It's all in how you present yourself.

You don't need to be new to the employment world to struggle with what to put in a résumé. This is an important advertising tool that takes time and skill to demonstrate how your past experiences and education fit a new position. Remember the soft skills discussed earlier. They work in any résumé. From there, you demonstrate your successes.

The following video is an animated look at why résumés are so important. You can read a transcript of the video here.

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Elements of Your Successful Résumé

Perhaps the hardest part of writing a résumé is figuring out what format to use to organize and present your information in the most effective way. There is no correct format, per se, but most résumés follow one of the four formats below. Which format appeals to you the most?

1. **Reverse chronological résumé**: A reverse chronological résumé (sometimes also simply called a chronological résumé) lists your job experiences in reverse chronological order—that is, starting with the most recent job and working backward toward your first job. It includes starting and ending dates. Also included is a brief description of the work duties you performed for each job, and highlights of your formal education. The reverse chronological résumé may be the most common and perhaps the most conservative résumé format. It is most suitable for demonstrating a solid work history, and growth and development in your skills. It may not suit you if you are light on skills in the area you are applying to, or if you've changed employers frequently, or if you are looking for your first job.
2. **Functional résumé**: A functional résumé is organized around your talents, skills, and abilities (more so than work duties and job titles, as with the reverse chronological résumé). It emphasizes specific professional capabilities, like what you have done or what you can do. Specific dates may be included but are not as important. So if you are a new graduate entering your field with little or no actual work experience, the functional résumé may be a good format for you. It can also be useful when you are seeking work in a field that differs from what you have done in the past. It's also well suited for people in unconventional careers.
3. **Hybrid résumé**: The hybrid résumé is a format reflecting both the functional and chronological approaches. It's also called a combination résumé. It highlights relevant skills, but it still provides information about your work experience. With a hybrid résumé, you may list your job skills as most prominent and then follow with a chronological (or reverse chronological) list of employers. This résumé format is most effective when your specific skills and job experience need to be emphasized.
4. **Video, infographic, and website résumé**: Other formats you may wish to consider are the video résumé, the infographic résumé, or even a website résumé. These formats may be most suitable for people in multimedia and creative careers. Certainly with the expansive use of technology today, a job seeker

might at least try to create a media-enhanced résumé. But the plain-text, traditional résumé is by far the most commonly used—in fact, some human resource departments may not permit submission of any format other than a document-based, plain-text résumé.

An important note about formatting is that initially, employers may spend only a few seconds reviewing each résumé—especially if there are a lot of them or they seem tedious to read. That's why it's important to choose your format carefully so it will stand out and make the first cut.

As potential employers do that first review, they are looking to see the evidence that you match, at least, all the minimum specifications in their ad or job listing. (If you do not match 100% of the minimums, and list it in the resume, then do not apply.)

PRACTICE QUESTION

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Writing Effective Résumés

For many people, the process of writing a résumé is daunting. After all, you are taking a lot of information and condensing it into a very concise form that needs to be both eye-catching and easy to read. Don't be scared off, though. Developing a good résumé can be fun, rewarding, and easier than you think if you follow a few basic guidelines. In the following video, a résumé-writing expert describes some keys to success. (Refer to Module 2: Writing in Business for learning about word processing software used for document creation. This is a good example of a Microsoft Word document.)

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To get started you will create your baseline or generic résumé. This is the hardest part where you gather your best experiences together. Later, we will learn how we modify this resume to better match each position we apply for. The order of the following sections may change depending upon where you are in your career and your match to the new position. For example, if you are a lifeguard and are applying to be the lifeguard supervisor, you would list that work experience early in the résumé. If you are a lifeguard while you finish your college degree in Accounting, then you would list your education before your work experience. This is one of many reasons to modify a résumé for each position applied to.

The purpose of a résumé is not to get a job, but to get to the next level in the screening process.

The following activity will introduce you to the components of a résumé, what you should and shouldn't include, and a few good and bad examples of resumes.

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Click here for a text-only version of the activity.

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Digging In Deeper

There are a few sections of a résumé that merit deeper discussion as they should be the main content of the document:

- Work experience
- Volunteer experience
- Education and training

Work Experience

Depending on the résumé format you choose, you may list your most recent job first. Include the title of the position, employer's name, location, and employment dates (beginning, ending)

Work experience is on all résumés, even if you feel the work is not directly connected to the job you are trying to get. Even a first-time entrant to the job market has some experience. Perhaps you have been a baby sitter or lawn mower. Those hard skills of diaper changing or emptying grass bags may not be a part of the new job, but your reliability and customer service will be.

Listings of your work experience should offer sufficient detail that the reader could check your background if needed. Do remember this document is marketing you, so while one would never, never ever lie, it is okay to list the jobs you've had that are most relevant to the current position, but you do not need to list every job you've had. If you have been in the work force for twenty years, that first job you held for two years as a cashier may not be relevant to this District Manager job that you are now applying for.

There are times where location establishes the veracity of your background. At other times, the location may not be relevant. Say you have worked for one company for ten years and been transferred to three cities. The employer's name is likely sufficient without listing all the various locations in which you have worked for them. However, if you have moved from a small store to managing a flagship location, for example, then location can be a critical part of the impact of the listing in your résumé.

Dates can be another touchy subject. Perhaps there has been an awkward time where you went through several jobs in quick succession, and you would prefer not focusing on all those early departures. You could consider another résumé format, or while still listing the jobs in order, remove the dates or perhaps only list the years, rather than months and years. Be aware that any resume gaps or other chronological anomalies are going to raise questions. Be ready to address these in your cover letter and in a prepared answer when you get to the interview stage.

Work experience is frequently listed near the top of the resume page or perhaps just below the Education section.

Volunteer experience

Assuming that you are not applying to a non-profit organization, use volunteer jobs in a limited fashion. For people new to the workforce with limited paid job experience, they can show important skills. They may also support the concept of a well-rounded, socially connected employee. With volunteer experience, there is the risk of triggering some unknown (implicit) bias of the employer. If you are listing your volunteer work to demonstrate leadership and organizational expertise, it will be up to you if you want to include your volunteer coordination of a local Beer Pong league (which may seem unprofessional to some) or your organizational work at any politically aligned organizations (which may not align with the politics of those in charge of the hiring process).

No one wants to work for a company that would intentionally discriminate, and you should not; however, it is sometimes wise to be sensitive to the things readers might read into your résumé before they meet you.

If your only work experience is volunteering, list it high in the résumé. If it is a supplement to work experience, list it toward the bottom of the résumé.

Education and Training

Formal and informal experiences matter; include academic degrees, professional development, certificates, internships, etc.

Education is most often separated from other sections with various titles such as Training or Certifications. When detailing your formal education, list from your highest degree down. If you have a high school or G.E.D degree, list it only if you have no college experience. Once you have college experience to add to your resume, the prior schooling is assumed and does not need to be listed.

Education is listed in a similar fashion to Work Experience. List the name of the school, location (yes, there is a Miami in Ohio (Miami University) and in Florida (University of Miami). If you are under forty, list the graduation year for any degree. After that age, the choice is yours about listing the year. If you are still in college and expect to graduate in one year, it is fine to list that year. The reader will know that you are finishing the degree by next May.

There are other relevant items of training that should be listed to improve your chances of earning an interview. Label that section as such and then follow a standard listing that is usually the name of the training or certification, provider or certifying body, and date. For example, a CPR (cardiopulmonary resuscitation) certificate means more to those applying to be paramedics than accountants and might be optionally listed or not at all listed. Yet a CPA (certified public accountant designation) will be a huge boon to those applying to some type of accounting or bookkeeping position and should be listed. Certifications are generally listed toward the bottom of a resume.

Creating a Customized Résumé

On the prior pages, we learned the purpose and sections for résumés: simply to help you get to the interview. To get there, your résumé must quickly demonstrate how you meet all the minimum skills the employer requested and perhaps more. You cannot change who you are and what experiences you have, but you can change the way the information is presented. In this section, we will demonstrate how the common building blocks of a résumé may be constructed and reorganized to help you look your best.

First, let us address how to build each building block. At this point, they are offered in no particular order. We will talk about formatting later as well. This section is written for the typical chronological résumé since it is the most common. The skills learned here may be modified to match the types identified earlier in the chapter.

Building Block Section	Example	Comments
You and contact information	Max P Kimble345 Baxter Street Columbus, TX 12345 749-234-2839 max.kimble@resume.com	While most employers will call or use email, the postal address adds an air of stability.Avoid any “sillybaby@yahoo.com” type email address or KimbleandKids@home.com.” Open a new email account that is just yours and has a professional tone. Never, never ever, use your current employer’s email address when applying to a new employer. An employer’s email address is only suitable when applying within the same company. The phone number you use is likely a cell. Be sure your voicemail message is updated to a professional greeting. Ensure that number is not shared or answered by anyone else who might offer a less than professional greeting.
Objective or Career Objective		Do not use. All this does is talk about what you want. Employers are not hiring you to make you happy, but to satisfy their own need.
Skills or Career Summary	Skills: Leadership, CPA, type 100 wpm, able to work in fast paced environment.Career Summary: Experiences in sales management with five years in sales and three years in sales management. All years meeting or exceeding quotas. Customer satisfaction levels exceeding all peers.	Fill this section with six to eight specific skills and abilities needed by the job you are applying to. Or use short sentences or phrases to highlight relevant successes.Here you can quickly tell a workplace story to verify your ability. Use the words and order of skills to match the ad. Focus on minimum requirements before preferred requirements.

<table>
<tr><th>Building Block Section</th><th>Example</th><th>Comments</th></tr>
<tr><td>Work Experience</td><td>Sales Manager, Friedo Inc, 2014–present
Exceeded annual objective by 10% in seven of ten years.
Delivered seventeen unsolicited proposals every year.
Guided team of three to on-time delivery of sales bids in 100% of opportunities.</td><td>Notice how the job title, company, and year anchors the important part. The important part is describing what you did in terms of the measurable successes you had.Notice how the bullets are constructed in parallel fashion.

Repeat this process for each relevant job. Use the most current positions that relate to the ad. Add non-related jobs only to fill in a page to at least three-quarters full.

This should not be a job description. Instead, it should focus on your accomplishments and your role in the work. The bullets below represent what not to do. Can you see the difference?

Sales Manager, Friedo Inc, 2014–present
Sold systems based on annual sales objectives
Created unsolicited proposals as requested
Work with team to create sales proposals and presentations as assigned.</td></tr>
</table>

Building Block Section	Example	Comments
Education	MBA, University of Florida, 2003BA Communication, St Charles University, 2001	The examples of the education are the simplest listings.If you have a GPA of 3.5 or above, list it. You worked hard and earned it. Some will list at 3.0. Below that no one will ask or will particularly care—the fact that you graduated is the point. If your experiences in college match the ad, help the hiring company see that by listing them. There is no need to list high school or G.E.D. if you are in college or have attended college. If not, then list the high school from which you graduated. Here are more detailed options for listing education when someone is applying to an accounting position. MBA, University of Florida, 2003 • 12 credit hours advanced accounting including Cost Accounting, Inventory and Material Accounting and Investment Accounting BA Communication, St Charles University, 2001 • 16 hours in Accounting, Minor in Accounting
Other Sections: • Certifications • Volunteer		Use as needed.

With these building blocks in mind, you may build your first résumé. With that solid foundation, you will reorder and reword to match the requirements of the job that you are applying for. It's often a good idea to create a "master" résumé that contains all of your experiences and qualifications, then when applying for a new position, you can make a copy of that master and trim it back to only include relevant experience—that way you won't find yourself trying to come up with the perfect wording for each job every time you want to use it in a specific application.

Perhaps the most important part of creating your résumé is proofreading. Your résumé should follow standard American English conventions (assuming you're applying to a job in America) for spelling, grammar, and punctuation. Once you have finished creating your document, take a short break and then return to your résumé with fresh eyes (or have someone else take a look!).

PRACTICE QUESTION

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Writing Effective Cover Letters

What Is a Cover Letter?

A cover letter is a letter of introduction, usually three to four paragraphs in length, that you attach to your résumé. It's a way of introducing yourself to a potential employer and explaining why you are suited for a position. Employers may look for individualized and thoughtfully written cover letters as an initial method of screening out applicants who may lack necessary basic skills or who may not be sufficiently interested in the position.

Often an employer will request or require that a cover letter be included in the materials an applicant submits. There are also occasions when you might submit a cover letter uninvited: for example, if you are initiating an inquiry about possible work or asking someone to send you information or provide other assistance.

With each résumé you send out, always include a cover letter specifically addressing your purpose.

This purpose is to let the receiver know how well you match their needs. It is a careful blend of the direct and persuasive letters you read about earlier in this book.

Characteristics of an Effective Cover Letter

Cover letters should accomplish the following:

- Get the attention of the prospective employer
- Set you apart from any possible competition
- Identify the position you are interested in
- Specify how you learned about the position or company
- Present highlights of your skills and accomplishments
- Reflect your genuine interest
- Please the eye and ear

The following video features Aimee Bateman, founder of Careercake.com, who explains how you can create an incredible cover letter. You can download a transcript of the video here.

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Cover Letter Resources

	WEBSITE	DESCRIPTION
1	Student Cover Letter Samples (from About Careers)	This site contains sample student/recent graduate cover letters (especially for high school students and college students and graduates seeking employment) as well as cover letter templates, writing tips, formats and templates, email cover letter examples, and examples by type of applicant
2	How to Write Cover Letters (from CollegeGrad)	This site contains resources about the reality of cover letters, using a cover letter, the worst use of the cover letter, the testimonial cover letter technique, and a cover letter checklist
3	LinkedIn Cover Letter	This site contains articles, experts, jobs, and more: get all the professional insights you need on LinkedIn
4	Cover Letters (from the Yale Office of Career Strategy)	This site includes specifications for the cover letter framework (introductory paragraph, middle paragraph, concluding paragraph), as well as format and style

INTERVIEWING

What you'll learn to do: Discuss effective interview strategies and prepare for common interview questions

Landing a job isn't as easy as applying for one, plain and simple. In the end, you've only got one shot with a prospective employer before they move on to greener pastures, so do everything you can to be the greenest pasture there is. This module will help you:

- Break down the interview process, and show you how to prepare for the steps within

- Apply helpful tips and prepare answers to practice questions so you are comfortable highlighting your core skills and experience during an interview

LEARNING OUTCOMES

- Describe effective strategies to prepare for an interview
- Differentiate between types of interview situations and identify appropriate interview techniques for each
- Discuss various question types common in interviews

Preparing For a Job Interview

If your résumé and cover letter have served their purposes well, you will be invited to participate in an interview with the company or organization you're interested in. Congratulations! It's an exciting opportunity, and your prospects for employment are very strong if you put in the time to be well prepared.

In this section we look at how to get ready for an interview, what types of interviews you might need to engage in, and what kinds of questions you might be asked.

Preparing Effectively for a Job Interview

Review the Job Description

When you prepare for an interview, your first step will be to carefully read and reread the job posting or job description. This will help you develop a clearer idea of how you meet the skills and attributes the company seeks.

Research the Company or Organization

Researching the company will give you a wider view of what the company is looking for and how well you might fit in. Your prospective employer may ask you what you know about the company. Being prepared to answer this question shows that you took time and effort to prepare for the interview and that you have a genuine interest in the organization. It shows good care and good planning—soft skills you will surely need on the job.

Practice Answering Common Questions

Most interviewees find that practicing the interview in advance with a family member, a friend, or a colleague eases possible nerves during the actual interview. It also creates greater confidence when you walk through the interview door. In the "Interview Questions" section below, you'll learn more about specific questions you will likely be asked and corresponding strategies for answering them.

Plan to Dress Appropriately

Interviewees are generally most properly dressed for an interview in business attire, with the goal of looking highly professional in the eyes of the interviewer. In the article "Here's What 'Business Casual' Really Means" by Jacquelyn Smith, learn exactly what is meant by "business casual," and see the specific types of attire appropriate for men and women.

Come Prepared

Plan to bring your résumé, cover letter, and a list of references to the interview. You may also want to bring a portfolio of representative work. Leave behind coffee, chewing gum, and any other items that could be distractions.

Be Confident

Above all, interviewees should be confident and "courageous." By doing so you make a strong first impression. As the saying goes, "There is never a second chance to make a first impression."

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In the Interview

Once you are in the interview, there is that rush of adrenaline that comes with the desire to excel and land the next interview or better yet the job itself. The simplest thought in the interview is to quickly wonder, "Why did s/he ask that question?" It sure is not a social question. That person wants to know how I can do this new job. I quickly have to demonstrate that I have what it takes.

There are all kinds of cute names for interview techniques. STAR is one such technique that quickly helps you present the stories of your career in a way to demonstrate skills to the interviewer. STAR stands for Situation, Task, Activity, Result. This is a way showcase your skills in under two minutes by setting the context of when you exercised a skill, describing what was required of you, what you did, and how the situation concluded. Here is a nice summary with examples from the article "Using the Star technique to shine at job interviews: a how-to guide" by Michael Higgins.

Interview Types and Techniques

Every interview you participate in will be unique. The people you meet with, the interview setting, and the questions you'll be asked will all be different from interview to interview.

The various factors that characterize any given interview can contribute to the sense of adventure and excitement you feel. But it's also normal to feel a little nervous about what lies ahead. With so many unknowns, how can you plan to "nail the interview" no matter what comes up?

A good strategy for planning is to anticipate the type of interview you may find yourself in. There are common formats for job interviews, described in detail below. By knowing a bit more about each type and being aware of techniques that work for each, you can plan to be on your game no matter what form your interview takes.

Using your LinkedIn, GlassDoor, or Zip Recruiter account and other web searches, you can sometimes learn more about the company you will be interviewing with. That may help you plan for the types of interviews listed below. Most of these prepare for a series of interviews, which is more common than a single interview followed by an offer.

Screening Interviews

Screening interviews might best be characterized as "weeding-out" interviews. They ordinarily take place over the phone or in another low-stakes environment in which the interviewer has maximum control over the amount of time the interview takes. Screening interviews are generally short because they glean only basic information about you. If you are scheduled to participate in a screening interview, you might safely assume that you have some competition for the job and that the company is using this strategy to whittle down the applicant pool. With this kind of interview, your goal is to win a face-to-face interview. For this first shot, though, prepare well and challenge yourself to shine. Try to stand out from the competition and be sure to follow up with a thank-you note.

This is where studying the job ad or other reference may be the most helpful. That starting point has many specific words describing the opportunity. Work to use those words in your interview and think about the experiences you have that use those concepts. For example, if you were a "supervisor" and the ad talks about a "manager," be sure to describe how many people you "managed" rather than how many people you "supervised."

Phone or Web Conference Interviews

If you are geographically separated from your prospective employer, you may be invited to participate in a phone interview or online interview instead of meeting face-to-face. Technology, of course, is a good way to bridge distances. The fact that you're not there in person doesn't make it any less important to be fully prepared. In fact, you may wish to be all the more "on your toes" to compensate for the distance barrier. Make sure your equipment (phone, computer, Internet connection, etc.) is fully charged and works. If you're at home for the interview, make sure the environment is quiet and distraction-free. If the meeting is online, make sure your video background is pleasing and neutral, like a wall hanging or even a white wall. (See Module 9: Communicating Through Technology for more on video calls.)

If you are not familiar with web conferences, be sure to do a mock run with a friend first to trouble shoot any issues. This helps you become comfortable with the controls and camera settings. It has been known to happen that candidates dress well for the camera but forget about the laundry hanging in the background. Test volume as well so that you do not waste valuable time on the call saying "can you hear me?" People want to see your face more than your toes, so understand where that distance is. Position your camera in a place you will naturally look, which is right over the screen that the interviewer is seen on.

One-on-One Interviews

The majority of job interviews are conducted in this format—just you and a single interviewer—likely with the manager you would report to and work with. The one-on-one format gives you both a chance to see how well you connect and how well your talents, skills, and personalities mesh. You can expect to be asked questions like "Why would you be good for this job?" and "Tell me about yourself." Many interviewees prefer the one-on-one format because it allows them to spend in-depth time with the interviewer, and they feel it is easier to build rapport face to face. As always, be very courteous and professional. Have a portfolio of your best work at the ready.

These interviews begin with an entry to the room and a handshake. Practice yours, since a handshake is often the first impression you make.

Panel Interviews

An efficient format for meeting a candidate is a panel interview in which perhaps four to five coworkers meet at the same time with a single interviewee. The coworkers comprise the "search committee" or "search panel," which may consist of different company representatives such as human resources, management, and staff. One advantage of this format for the committee is that meeting together gives them a common experience to reflect on afterward. In a panel interview, listen carefully to questions from each panelist, and try to connect fully with each questioner. Be sure to write down names and titles, so you can send individual thank-you notes after the interview.

If you have created personal business cards, this is the time to hand each interviewer one. Hand them out yourself rather than slinging them across the table. Be sure to make eye contact.

Serial Interviews

Serial interviews are a combination of one-on-one meetings with a group of interviewers, typically conducted as a series of meetings staggered throughout the day. Ordinarily this type of interview is for higher-level jobs, for which it's important to meet at length with major stakeholders. If your interview process is designed this way, you will need to be ultra-prepared as you will be answering many in-depth questions. Stay alert.

Lunch Interviews

In some higher-level positions, candidates are taken to lunch or dinner, especially if this is a second interview (a "call back" interview). If this is you, count yourself lucky and be on your best behavior, because even if the lunch meeting is unstructured and informal, it's still an official interview. Do not order an alcoholic beverage, and use your best table manners. You are not expected to pay or even to offer to pay. But, as always, you must send a thank-you note.

Many candidates worry about the right food to order. Think of the meal interview as more of an interview and less of a meal. Order a moderately priced item that is not likely to be difficult to eat. Then plan to focus on engaging with the other person more than digging in.

Group Interviews

Group interviews are comprised of several interviewees and perhaps only one or two interviewers who may make a presentation to the assembled group. This format allows an organization to quickly pre-screen candidates. It also gives candidates a chance to quickly learn about the company. As with all interview formats, you are being observed. How do you behave with your group? Do you assume a leadership role? Are you quiet but attentive? What kind of personality is the company looking for? A group interview may reveal this.

SUMMARY

For a summary of the interview formats we've just covered (and a few additional ones), take a look at the following video, *Job Interview Guide—10 Different Types of Interviews in Today's Modern World.*

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Interview Questions

For most job candidates, the burning question is "What will I be asked?" There's no way to anticipate every single question that may arise during an interview. It's possible that, no matter how well prepared you are, you may get a question you just didn't expect. But that's okay. Do as much preparation as you can—which will build your confidence—and trust that the answers will come.

As you respond to the questions, try to remind yourself, that this is not so much "about you" as about the interviewer finding the right fit for this opening. The questions are establishing whether your skills and experiences will meet the needs of this company. That is where your research comes in. You can work to explain your background relative to this new environment. If the interviewer says, "Tell me about you," that is not a cue to start

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with your earliest memory. Instead, focus on the specific knowledge and skills you possess as related to what you know about this position.

The simplest place to start is to have a list of about four to six examples of workplace actions that you are proud of. Think of times you excelled. Then think about how this same story might fit several situations. One story might show initiative, leading others, decision making, and more. With these stories in mind, when a question comes, pull out the best fit and reword it to match the specific question. Try creating that list now, then use the question banks below to see what fits and what other situations you might need to have mentally ready.

There is no substitute for going through as many questions as you can prior to the interview. As you practice on your own, do not just read these questions and think. Do sit in front of a mirror and answer the questions fully. This is the practice that will set you up for adapting to various interview situations.

PRACTICE QUESTION

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To help you reach that point of sureness and confidence, take time to review common interview questions. Think about your answers. Make notes if that helps. Then conduct a practice interview with a friend, a family member, or a colleague. Speak your answers out loud. Below is a list of resources that contain common interview questions and good explanations/answers you might want to adopt.

If you can use the databases below to find questions to practice with, record yourself. Then watch the recording and score each response against the STAR technique discussed earlier. From these databases, look at the broad categories of questions so that you may prepare some responses and examples for each category. Some categories may be:

Type	Example	Considerations
Goodwill, Greetings and Get Acquainted	Tell me about yourself.	No more than two minutes. List the highlights of your resume with a brief example, if possible.
Gauging Your Interest	Why are you interested in this position?	Make this position tops on your interest list, without ever alluding to any other search. Avoid sounding like this might be any other than a first choice (For example,"When I happened to see your ad" makes the job posting sound trivial to you.)
Your Experience and Accomplishments	How has your education prepared you for this position?	Be confident. Everyone knows you have not done this job yet, but you must sound like you are ready for this job. Avoid the natural hesitation you may feel ("I think I'll be great" versus "With these skills, I can…")
The Future	What would you most like to accomplish if you get this position?	There's no need to over promise or worry, but do demonstrate you have a plan for this job or for life versus just hoping things will work out. Offer some realistic career goals based on some practical skill or education you have.
Challenging	What type of people do you have no patience for?	We all have weaknesses. Being aware of them is a great skill. Turning them to our advantage is even better. "While I get along well with most people, those who complain rather than try to find a solution can be hard on my patience."
Situational	If you were aware a co-worker was falsifying data, what would you do?	The employer probably wants to see how you handle difficulties on your own and what logical process you may use to solve problems. Remember to focus on the company's outcome and expense while not compromising your own standards.
Behavioral	Describe a time you worked as part of a team.	While all interview responses work well with the STAR technique, this is the type of question best suited to it.

Why Should We Hire You

From the Ohio State University Fisher College of Business Career Management Office, here is a video featuring representatives from recruiting companies offering advice for answering the question "Why should we hire you?" As you watch, make mental notes about how you would answer the question in an interview for a job you really want.

A YouTube element has been excluded from this version of the text. You can view it online here: https://courses.lumenlearning.com/wmopen-businesscommunicationmgrs/?p=1695

READ MORE

In closing, we suggest reading the essay "It's Like Online Dating," by Jackie Vetrano. In this essay, the writer compares job hunting—including résumé creation and cover-letter writing—to online dating. In this last section, she concludes with a look at the job interview and compares it to a first date.

PUTTING IT TOGETHER: FINDING A JOB

Let's return to Nadine from the beginning of the module, who was just planning her career path. She was lucky to have a steady job at her local grocery store as she took the time to find just the right job to meet her needs. Initially, she thought finding that new job would be so easy with her degree. As it turned out, looking for that career-type job took about as much time as going to school had.

With some advice from the school career center (what a nice surprise to realize that she could go to both her community college and four-year college career centers; they accepted all alumni forever), she started to build her network. She started small, by attending a job fair on campus and the alumni baseball game gathering, which lead to going to a luncheon for women in business. From there, she met a couple of women to hang out with. That network helped her think about specific employers and job skills. Once she had a better handle on those items, those same groups helped her find leads to all several interviews.

While these initial contacts (and friends) didn't call her up and ask her to work for them, they had ideas she had not thought about and helped her deepen her knowledge of the industry. Sometimes they would mention a company or a job they had heard was becoming available and then Nadine was able to find it listed on LinkedIn. There she had applied, and had reached out to let those with connections to that company know she was interested. Frequently she got through to a phone interview. For those three big jobs she was really interested in, she was pretty sure it was not only her skills but the good words her new network put in for her that got her in the door.

While all that was going on, she had to write and rewrite her resume to match each opportunity. In two different college classes, she had prepared a resume and cover letter, which saved her a lot of time as she was able to use those documents as a starting point. As she applied to jobs, she tweaked and changed wording to really help her background stand out by matching criteria from the job advertisement.

Interviewing was the hardest. After her first interview following graduation, she really wished she had practiced more. All the way home, she could hear herself stumble over answers that now, of course, as she drove away, she was phrasing so well in her head. By that final interview, with all those other experiences behind her, she was comfortable talking about her accomplishments as they would benefit this new company. This was one skill she vowed she would never let get rusty.

After a long search and a lot of work, Nadine was finally able to secure a job to get her started on her career path.

MODULE 15: RECRUITING AND SELECTING NEW EMPLOYEES

WHY IT MATTERS: RECRUITING AND SELECTING NEW EMPLOYEES

Why does recruiting matter?

Isn't business success all about the big idea? The reason recruiting and selection is so important is that employees can make or break a company. An employee also represents, in a financial sense, a very high risk investment. A company's personnel costs are often a business' single largest expense. According to the Society for Human Resource Management, salaries alone can account for 18 to 52 percent of your operating budget (Note: Deeb, Carol. "Percent of a Business Budget for Salary." *Chron*. Web. 26 June 2018.). Add in payroll and unemployment insurance taxes, workers compensation, overtime, benefits, reimbursements, leave and holiday pay, and the full cost of salaries and benefits could be in the forty to eighty percent of gross revenue range (Note: Ferguson, Grace. "What Percentage of the Budget Should Be Spent on Payroll?" *Chron*. Web. 26 June 2018.). No wonder it's said that people are a company's greatest asset.

Choose well, and your employees can be a source of competitive advantage. A poor choice can represent a critical liability. Let's elaborate on the downside risk. The U.S. Department of Labor estimates that the average cost of a bad hiring decision is thirty percent of the employee's first year projected earnings (Note: Cardenas, Rebekah. "What's the Real Cost of a Bad Hire?" *HR Exchange*, 02 Apr 2014. Web. 26 June 2018.). Note, however, that number represents only a fraction of the organizational impact. Chief financial officers surveyed by global staffing firm Robert Half ranked morale (39 percent) and productivity (34 percent) effects of a bad hire greater than the monetary (25 percent) cost.

In this module, we'll learn how to choose well—from attraction through selection—and avoid related legal liabilities.

FINDING QUALIFIED JOB APPLICANTS

What you'll learn to do: Describe effective strategies for recruiting qualified job applications.

Recruiting is the art of attraction, a process that requires a clear understanding of what makes the company unique as well as what type of person a company wants to attract. Recruiting is often a process of discovery and evaluation for both company and candidate.

The reality is there's no one best place to work. In the retail space alone, candidates can choose from cult brands including Apple, IKEA, and Lululemon as well as a number of beloved regional brands. With so many "Best of" and "Great Place to Work" options and the unemployment rate at historic lows, the market for talent is competitive.

READ MORE

Take a look at these reviews on great places to work:

- Great Places to Work
- Business Insider's "The 10 best retail companies to work for in 2017, according to employees"

In this section, we'll discuss effective strategies for identifying, attracting and recruiting qualified candidates, including equal opportunity laws to be aware of throughout the hiring process.

LEARNING OUTCOMES

- Create a compelling job advertisement
- Identify methods for finding qualified potential employees
- Describe the laws designed to prevent bias and discrimination in hiring
- Describe techniques to help screen a potential employee
- Discuss the usefulness of creating additional assignments for potential candidates to complete

Writing a Job Advertisement

Managers know more than anyone else about what a particular position involves and what kinds of skills an employee needs to do the job effectively. They may be the one to request the creation of a new position. They are very likely to be asked to help define an existing job or a new job. They, with the help of HR professionals, will describe the tasks and responsibilities of the position as well as the qualifications required. When you read job advertisements, do you ever wonder how the company comes up with the job advertisement?

Company Brand

Creating a compelling job advertisement is similar to writing a compelling marketing pitch. The first step in the process is attraction, defined as "a quality or feature of something or someone that evokes interest, liking, or desire." It's no surprise then that one of the best practices for recruiting is for an organization to cultivate a strong employment brand.

In a recruiting best practices perspective post (Note: https://www.woodpersonnel.com/2012/10/30/recruiting-in-nashville-what-does-your-companys-employment-brand-really-convey-to-job-candidates/), Wood Personnel asks: "How is a new job with your company like a new car? 'Brand' matters." The post goes on to explain that "job seekers . . . treat new job searches the same way they treat major purchase decisions. They use digital tools to conduct extensive brand research before making a final choice." In order to attract the best candidates, hiring managers need to clearly define their employment brand. Here are a few specific recommendations to help you do so:

- Clarify your corporate culture
- Understand your market position
- Set performance expectations
- Help candidates determine whether they would be a good fit before they even apply

PERSPECTIVE POINT

A clear and compelling employer value proposition not only tells candidates why they want to work for you, but it also reminds current employees why they're there.

PRACTICE QUESTION

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Job Analysis

In order to advertise a job, you first have to understand what that job entails (at least to best current knowledge, as jobs are often shifting in their scope). Job analysis is often done with the help of Industrial and Organizational (I-O) psychologists. There are two related but different approaches to job analysis—you may be familiar with the results of each as they often appear on the same job advertisement. The first approach is task-oriented and lists in detail the tasks that will be performed for the job. Each task is typically rated on scales for how frequently it is performed, how difficult it is, and how important it is to the job. The second approach is worker-oriented. This approach describes the characteristics required of the worker to successfully perform the job. This second approach has been called job specification (Dierdorff & Wilson, 2003). For job specification, the knowledge, skills, and abilities (KSAs) that the job requires are identified.

Observation, surveys, and interviews are used to obtain the information required for both types of job analysis. It is possible to observe someone who is proficient in a position and analyze what skills are apparent. Another approach used is to interview people presently holding that position, their peers, and their supervisors to get a consensus of what they believe are the requirements of the job.

How accurate and reliable is a job analysis? Research suggests that it can depend on the nature of the descriptions and the source for the job analysis. For example, Dierdorff & Wilson (2003) found that job analyses developed from descriptions provided by people holding the job themselves were the least reliable; however, they did not study or speculate why this was the case.

LEARN MORE

The United States Department of Labor maintains a database of previously compiled job analyses for different jobs and occupations. This allows the I-O psychologist to access previous analyses for nearly any type of occupation. This system is called **O*Net** (accessible at www.online.onetcenter.org). The site is open and you can see the KSAs that are listed for your own position or one you might be curious about. Each occupation lists the tasks, knowledge, skills, abilities, work context, work activities, education requirements, interests, personality requirements, and work styles that are deemed necessary for success in that position. You can also see data on average earnings and projected job growth in that industry.

The O*Net database describes the skills, knowledge, and education required for occupations, as well as what personality types and work styles are best suited to the role. See what it has to say about being a food server in a restaurant or an elementary school teacher or an industrial-organizational psychologist.

Selling the Job

With the employer brand clarified and the job defined, we can move on to selling the job. What differentiates a compelling ad from one that isn't noticed, or worse, rejected, is emotion. That is, in order to make a job advertisement compelling, you must make an emotional connection. Brand and Marketing Strategist Alex Honeysett's recommendations for writing a compelling blog post also apply to writing a compelling job ad: "Now more than ever, people want to connect with brands in a human way." (Note: https://www.themuse.com/advice/the-1-tip-for-writing-a-compelling-makespeoplewanttoshareit-blog-post) And candidates are seeking that same humanity in potential employers. Her two key recommendations: share a story and write with a specific person in mind. The rationale for the latter point: "By writing with one person in mind, your tone, story, and message will be much more focused and detailed than if you're writing to a nameless, faceless group of people. And your readers will connect to that focus and detail." (Note: Ibid.)

The following nine-step job ad development process is a combination of Honeysett's recommendations and Betterteam's job posting template (Note: https://www.betterteam.com/job-posting-template):

1. Write a compelling headline
2. Craft a compelling hook
3. Write with a specific person in mind
4. Pitch the position with emotion as well as the key facts
5. Tell the company's story—and invite the candidate to be part of it
6. Sell the area
7. Summarize, selling the package
8. Close with a call to action
9. Have a member of the target audience read and comment

Read more: CareerBuilder's 5 Best Practices for Defining Your Employer Brand: https://resources.careerbuilder.com/employer-blog/5-best-practices-defining-employment-brand

Finding Potential Employees

CareerBuilder's advice for building an employer brand is equally applicable to getting the word out about a job opportunity—specifically: "be everywhere." (Note: https://resources.careerbuilder.com/employer-blog/5-best-practices-defining-employment-brand) As noted above, job candidates search for jobs essentially the same way they make purchase decisions, managing multiple points of contact including college and company career pages, job boards, and social media sites as well as attending live events. If the possibilities seem overwhelming, use the candidate research you conducted to narrow the options. That is, if you have a clear understanding of who your ideal candidate is—a specific person in mind—you can use that information to inform your choice of touch points.

PRACTICE QUESTION

So how do you find the perfect candidate for a job opening? There are several techniques. Advertising in newspapers and trade publications can be effective. Most recruiters also use online sources to find job

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candidates. For example, sites such as Indeed, Monster, and CareerBuilder are very popular. Employers can list jobs on these sites and can search through resumes to find potential employees.

IS SOCIAL MEDIA A GOOD IDEA?

Is Facebook, Instagram or Twitter a better means of connecting with potential employees? Pew Research Center social media use data can inform that decision. A few excerpts from their Social Media Use 2018 findings:

- Americans ages 18 to 24 are substantially more likely to use platforms such as Snapchat, Instagram and Twitter even when compared with those in their mid- to late-20s.
- Pinterest remains substantially more popular with women (41 percent of whom say they use the site) than with men (16 percent).
- LinkedIn remains especially popular among college graduates and those in high-income households. Some 50 percent of Americans with a college degree use LinkedIn, compared with just 9 percent of those with a high school diploma or less.
- The messaging service WhatsApp is popular in Latin America, and this popularity also extends to Latinos in the United States—49 percent of Hispanics report that they are WhatsApp users, compared with 14 percent of white Americans and 21 percent of black Americans.

In hiring, you should also consider candidates suggested by existing employees, talk to people who walk in to inquire about jobs, reach out through college recruitment events and job fairs, and contact individuals who have received certification through programs such as Udacity. Another option is to work through recruiters called “head hunters” who find individuals with the right skills and invite them to apply for a particular position.

In many cases, jobs are opened up to internal candidates before they are advertised to the wider world. When that happens, jobs are advertised through company newsletters and bulletin boards and candidates go to HR to apply for the job.

To that point, employee referrals are one of the best sources of qualified candidates. In Fundamentals of Human Resource Management, the authors state that

> “Employee referrals tend to be more acceptable applicants, who are more likely to accept an offer and, once employed, have a higher job survival rate.”

Three caveats to be aware of with regards to employee referrals:

1. An employee might mistakenly assume job performance competence based on friendship.
2. Employee referrals may lead to nepotism or hiring individuals who are related to persons already employed by the company.
3. Employee referrals may reinforce the status quo rather than advance a diversification objective.

Bias and Protections in Hiring

Equal opportunity is one of our nation's core values and should be a core company policy. As discussed in Module 13: Social Diversity, seeking out diverse candidates is a Human Resource best practice. Having a policy of recruiting diverse candidates reflects an awareness of demographic and socio-cultural trends as well as allowing your company to tap into the broadest range of expertise, skills, and global and cultural insight—factors that drive growth and innovation.

However, we still live in a society where individuals that belong to a majority group often benefit from a system that places minority groups at a disadvantage. There are several laws in place that seek to deter this type of discrimination.

As an SHRM article emphasizes: "Discrimination costs employers millions of dollars every year, not to mention the countless hours of lost work time, employee stress and the negative public image that goes along with a discrimination lawsuit." Equal employment opportunity isn't just the right thing to do, it's the law. Specifically, it's a series of federal laws and Executive Orders designed to eliminate employment discrimination. Illegal discrimination is the practice of making employment decisions such as hiring, compensation, scheduling, performance evaluation, promotion, and firing based on factors unrelated to performance. There are currently seven categories protected under federal law: age, disability, genetic information, national origin, pregnancy, race and color and religion and sex.

Some hiring criteria may be related to a particular group an applicant belongs to and not individual abilities. Unless membership in that group directly affects potential job performance, a decision based on group membership is discriminatory (Figure 1). For instance, some jobs may require the employee to perform a physical task, such as lifting and carrying heavy objects; in such cases the physical capabilities of applicants may be considered. However, most office jobs do not have such physical requirements, so it is discriminatory to ask about physical capabilities.

PRACTICE QUESTION

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To combat hiring discrimination, in the United States there are numerous city, state, and federal laws that prevent hiring (or not hiring) based on various group-membership criteria. For example, did you know it is illegal for a potential employer to ask your age in an interview? Did you know that an employer cannot ask you whether you are married, a U.S. citizen, have disabilities, or what your race or religion is? They cannot even ask questions that might shed some light on these attributes, such as where you were born or who you live with. These are only a few of the restrictions that are in place to prevent discrimination in hiring. In the United States, federal anti-discrimination laws are administered by the U.S. Equal Employment Opportunity Commission (EEOC).

(a) (b) (c)

Figure 1. (a) Pregnancy, (b) religion, and (c) age are some of the criteria on which hiring decisions cannot legally be made. (credit a: modification of work by Sean McGrath; credit b: modification of work by Ze'ev Barkan; credit c: modification of work by David Hodgson)

The EEOC's mission is to stop and remedy unlawful employment discrimination. Specifically, the EEOC is charged with "enforcing protections against employment discrimination on the bases of race, color, national origin, religion, and sex." Congress has expanded the agency's jurisdiction over the years and the EEOC is now responsible for enforcing the Equal Pay Act of 1963 (APA), the Age Discrimination in Employment Act of 1967 (ADEA), Section 501 of the Rehabilitation Act of 1973, Titles I and V of the Americans with Disabilities Act of 1990 (ADA), and Title II of the Genetic Information Nondiscrimination Act of 2008 (GINA). In 1972, Congress expanded Title VII protections to include federal government employees and granted the EEOC authority to pursue independent litigation against private employers under Title VII.

Note that state and local laws may provide broader discrimination protections. If in doubt, contact your state department of labor for clarification. Note as well that laws are subject to interpretation. For example, an EEOC notice (Note: https://www.eeoc.gov/eeoc/newsroom/wysk/enforcement_protections_lgbt_workers.cfm) emphasizes that their interpretation of the Title VII reference to "sex" is broadly applicable to gender, gender identity, and sexual orientation. And, further, that "these protections apply regardless of any contrary state or local laws."

PRACTICE QUESTIONS

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In summary, avoiding discrimination is not only the right thing to do, it's the best thing to do from a Human Resource and risk prevention standpoint. Complying with the law reduces a company's legal risk and an equal opportunity environment may increase employee productivity, retention and morale. Businesses may also be eligible for tax benefits associated with making your business accessible to or hiring individuals with disabilities. For additional information, refer to Appendix A of EEOC's "ADA Primer for Small Business."

MORE RESOURCES ONLINE

- EEOC's Digest of Equal Employment Opportunity Law: This publication includes feature articles on timely issues in equal employment opportunity law, as well as summaries of recent Commission decisions and federal court cases, as they affect Federal government employees.
- EEOC Publications, Including discrimination fact sheets

Screening Applicants

The objective of using various screening techniques and levels of screening is to filter out candidates that either don't meet the stated minimum requirements or aren't a good fit for cultural or other reasons (i.e., job realities or salary expectations). Screening is simply a process of elimination. The goal is to ensure that those candidates who are invited to participate in a face-to-face interview are, in fact, highly qualified.

There are four primary techniques for helping to screen potential candidates that also represent phases in the screening process:

1. Evaluation by Association: Use the posting location—i.e., an industry or professional association-specific job site—as an initial screen.
2. Application: Conduct an initial assessment based on review of a candidate's cover letter, resume and application. This may also include review of a candidate's business (i.e., LinkedIn) and/or social networking (i.e., Facebook or Twitter) profiles. To avoid investing time assessing a candidate that isn't viable, incorporate pre-screening questions that require the candidate to attest that he or she meets the stated minimum criteria. In this phase, the objective is to eliminate candidates that don't meet the basic requirements for the position based on fundamental factors including minimum experience and education, salary expectations and/or willingness to relocate or meet work schedule requirements, if applicable.
3. Assessment: Conduct a preliminary assessment of skills. This can be done in conjunction with or subsequent to the application review process. Depending on position requirements, a more in-depth assessment of a candidate's level of skill and aptitude may be appropriate.
4. Screening Interview: An initial telephone interview is a second level of active screening that's used to assess the candidate's objective and motivation, relevant education and experience and to get a sense for the candidate as a person. In the course of approximately twenty to thirty minutes, an interviewer can confirm application and resume details and assess a range of soft skills—for example, active listening and communication—as well as engagement and overall level of poise and professionalism. The objective is to eliminate candidates that don't warrant the time and cost of an in-person interview or in-depth skills assessment.
5. External Verification: Verify stated educational qualifications and check references.

Using these techniques in combination with an online application system allows companies to reduce the time and costs of a paper-based recruiting and screening process and may reduce liability associated with compliance reporting and record retention.

LEARN MORE

Check out SHRM's Guide to Application Tracking Systems.

PRACTICE QUESTIONS

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Portfolios, Practice Projects, Etc.

Regardless of an interviewer's (or interview panel's) experience, judgement, or relevant expertise, an interview is largely a matter of faith. That is, it relies on trust in the candidate's statements and resume. If position dynamics require a new employee to hit the ground running, it makes sense to assess a candidate's level of skill and knowledge relative to the stated job requirements.

WHAT DO YOU THINK? USING CUTOFF SCORES TO DETERMINE JOB SELECTION

Many positions require applicants to take tests as part of the selection process. These can include IQ tests, job-specific skills tests, or personality tests. The organization may set cutoff scores (i.e., a score below which a candidate will not move forward) for each test to determine whether the applicant moves on to the next stage. For example, there was a case of Robert Jordan, a 49-year-old college graduate who applied for a position with the police force in New London, Connecticut. As part of the selection process, Jordan took the Wonderlic Personnel Test (WPT), a test designed to measure cognitive ability.

Jordan did not make it to the interview stage because his WPT score of 33, equivalent to an IQ score of 125 (100 is the average IQ score), was too high. The New London Police department policy is to not interview anyone who has a WPT score over 27 (equivalent to an IQ score over 104) because they believe anyone who scores higher would be bored with police work. The average score for police officers nationwide is the equivalent of an IQ score of 104 (*Jordan v. New London*, 2000; ABC News, 2000).

Jordan sued the police department alleging that his rejection was discrimination and his civil rights were violated because he was denied equal protection under the law. The 2nd U.S. Circuit Court of Appeals upheld a lower court's decision that the city of New London did not discriminate against him because the same standards were applied to everyone who took the exam (*New York Times*, 1999).

What do you think? When might universal cutoff points make sense in a hiring decision, and when might they eliminate otherwise potentially strong employees?

There are three broad categories of job-specific testing that we'll discuss: work samples and simulations, cognitive ability tests, and personality tests.

Work Samples & Simulations

Work samples and simulation tests are used during the candidate evaluation process as a way for employers to evaluate job-specific skills and aptitude. A work sample consists of having a candidate perform a work-related task or subset of job tasks, generally in the actual workplace using the requisite equipment, processes and procedures. A work sample allows the employer to "preview" the candidate's performance and also gives the candidate a realistic job preview. In a simulation, the candidate would engage in a highly structured role-play designed to represent broad aspects of a the job, for example, assessing an applicant's problem solving, communication, and interpersonal skills. OPM notes that performance should be evaluated "by trained assessors who observe the applicant's behavior and/or by measuring task outcomes (e.g., the degree of interpersonal skills demonstrated or the number of errors made in transcribing an internal memo (Note: https://www.opm.gov/policy-data-oversight/assessment-and-selection/other-assessment-methods/work-samples-and-simulations/))." When administered and evaluated correctly, this assessment technique is one of the strongest predictors of job performance.

Cognitive Ability Tests

The McQuaig Institute describes a a cognitive ability or mental agility test as "a tool to measure aspects of general intelligence, such as mental agility and speed of thought, analytical thinking, the ability to learn quickly, and verbal reasoning skills." Psychological research indicates that cognitive ability is one of the most accurate predictors of job performance and the tests are significantly more accurate predictors of job performance than interviews or experience. To be precise, the correlation between cognitive ability and job success is 0.51 (1.0 would be a perfect or 100% predictor). This compares to a correlation of 0.36 for reference checks, 0.18 for years of experience and 0.18 for unstructured interviews (Note: http://blog.mcquaig.com/cognitive-ability-tests). An example of a Cognitive ability test is a general aptitude test (GAT). Limitation: As with any test, practice and using test strategies can decrease the validity of the test. Also, researchers have noted the racial differences in test results, with validity (as a predictor of performance) lower for blacks and hispanics (Note: https://www.ncbi.nlm.nih.gov/pubmed/24188390). To avoid the risk of discrimination, use this test in combination with other evaluation methods.

Personality Tests

Personality assessments such as the Big Five or Myers-Briggs Type Indicator (MBTI) can provide insight into a candidate's personality and whether he or she would be successful in a particular role or prospective company culture. As described by the U.S. Office of Personnel Management (OPM), the Federal Government's chief human resources agency, "Personality tests are designed to systematically elicit information about a person's motivations, preferences, interests, emotional make-up, and style of interacting with people and situations. This information is used to generate a profile used to predict job performance or satisfaction with certain aspects of the work." According to the OPM, "personality tests have been shown to be valid predictors of job performance in numerous settings and for a wide range of criterion types (e.g., overall performance, customer service, team work), but tend to be less valid than other types of predictors such as cognitive ability tests, assessment centers and work samples and simulations (Note: https://www.opm.gov/policy-data-oversight/assessment-and-selection/other-assessment-methods/personality-tests/)." One caveat: As a self-reported test, the effectiveness of personality tests is dependent on a candidate's commitment to test accuracy. Some individuals people may attempt to "game" the test, providing what they think is the "right" answer rather than an accurate response. For best results, verify that a test is designed to identify misrepresentations.

PRACTICE QUESTIONS

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INTERVIEWING A CANDIDATE

What you'll learn to do: Discuss the key elements of a successful interview.

While the prior section focused on developing a pool of qualified candidates, the objective of the interview process is to identify the "right" person. In order to ensure a successful outcome, a company has to consider who will be involved in interviewing, what questions to ask, and how to prepare for and conduct an interview. Whether you're on the hiring or job search side of the table, this section will prepare you to ace the interview.

LEARNING OUTCOMES

- Identify who should be present at an interview.

- Discuss how to come up with effective questions for an interview
- Discuss the process of effective phone interviews
- Discuss the process of effective face-to-face interviews

Who's in an Interview?

The question of who should be participate in an interview is function of a number of factors such as culture, Human Resource and/or position-specific experience, and expertise and business or industry practice.

In general, **one-on-one interviews**, conducted by a Human Resource representative or the hiring manager, are the most common.

A second type of interview is a **series interview**, where a candidate is evaluated in a series of one-on-one interviews with multiple interviewers. These interviewers usually include a Human Resource representative and the hiring manager as well as representatives from the teams the position is a part of and works with. Each interviewer will have a unique perspective and ask questions unique to their understanding of the job and its function within the company. Typically interviewers will all discuss their observations and evaluations with the hiring manager, who will make the final decision.

A third type of interview that is standard practice in academia and common in business is the **panel interview**. In a panel interview, a committee of several interviewers meets with the candidate at the same time. When using this format, interviewers generally ask an established set of questions in order, taking notes and, in some environments, filling out a corresponding evaluation form. The evaluation form is similar to a grading rubric, with individual questions weighted like evaluation criteria and totaling to 100 percent. After the interview, participants compare their observations and evaluations. Potential benefits of a panel interview include a broader and more reliable evaluation of a candidate's abilities and greater ownership of the results, which may also extend to greater support for the successful candidate during the onboarding process and beyond.

There are, however, some potential drawbacks of a panel interview:

- If a member of the interviewing team feels a particular candidate is a competitive threat, he or she may use the evaluation to sabotage the candidate.
- If an interviewer resents the position or feels it should be filled by a friend or colleague, results will be skewed.
- If an individual interviewer or the interview committee make a hiring recommendation that's overruled by management, there may be resentment toward the successful candidate and a decrease in the individual or committee members' engagement or motivation.

Regardless of the format used, those involved in the selection process should be trained in effective interviewing techniques and briefed on what questions are off-limits for both legal and candidate (employer brand) perception purposes.

PRACTICE QUESTIONS

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Asking Questions

For best results—and to avoid litigation—interview questions should relevant to the position and reflect the realities of both the position and the operating environment. To be specific, questions should focus on the job duties, relevant skills and qualifications, and related success factors. A key point to keep in mind is that questions represent not only the position but the company's values. Understand that an interview is a two-way assessment; that is, a candidate is also evaluating interview questions, assessments, and interactions with company representatives to determine believability and "fit."

There are two types of interviews: unstructured and structured. In an **unstructured interview**, the interviewer may ask different questions of each different candidate. One candidate might be asked about her career goals and another might be asked about his previous work experience. In an unstructured interview, the questions are often, though not always, unspecified beforehand. In an unstructured interview the responses to questions asked are generally not scored using a standard system. This type of interview can be particularly useful when interviewing for a new (and possibly still nebulously defined) position. As you interview candidates, their expertise and knowledge of the field will help flesh out the new position.

In a **structured interview**, the interviewer asks the same questions of every candidate, the questions are prepared in advance, and the interviewer uses a standardized rating system for each response. With this approach, the interviewer can accurately compare two candidates' interviews. In a meta-analysis of studies examining the effectiveness of various types of job interviews, McDaniel, Whetzel, Schmidt & Maurer (1994) found that structured interviews were more effective at predicting subsequent job performance of the job candidate.

Figure 1. Studies of job interviews show that they are more effective at predicting future job performance when they are structured.

What You Should Ask

Interview questions will be different for each job; after all, it takes very different skills to create a product than it does to sell the product. The job advertisement can be a good source for interview questions. After all, it contains a good summary of the required skills and knowledge needed for the position.

PRACTICE QUESTION

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Often you'll find that you have several equally talented candidates if you simply ask about the specific knowledge, skills, and abilities needed for the job. Once you've established your pool of top contenders, you can start looking at individuals to evaluate their fit in the company.

So how do you come up with these questions? First Round's interview with Koru Co-Founder and CEO Kristen Hamilton provides perspective on getting at the person behind the resume. The opening sentence is an admission: "Hiring the right people is hard." (Note: "Hire a Top Performer Every Time with These Interview Questions." *First Round Review*. Web. 10 July 2018.) In order to improve the odds of success, Hamilton recommends focusing on skill sets and mindsets instead of metrics such as GPA. Based on extensive employer research and reverse engineering exceptional performers, Hamilton identified seven core characteristics that in combination translate into job success or, as she phrases it, "someone killing it at their job": (Note: Ibid.)

- **Grit.** In today's fast-paced working environment, employees need to be resilient, able to work through difficult or boring projects. You may ask candidates to talk about lengthy projects they've completed, and ask about how they persevered.
- **Rigor.** Employees need to use data they have at hand or gather data to make good decisions. You may ask candidates about a time they made a difficult decision at work, and how they arrived at that conclusion.

- **Impact.** Teams work better when each member is working together to achieve the company's goals. You may ask candidates about efforts they've made in the past that either helped their previous company's mission or that are related to your company's mission.
- **Teamwork.** Speaking of teams working together, this is an essential trait in almost any employee. Even individuals who mostly do solitary work need to at least talk to their managers to report how things are going. Questions for this will vary depending on how much teamwork is needed for the position. You may ask candidates about their work in teams in the past.
- **Ownership.** Employees need to have personal responsibility for their positions. In order for a company to run smoothly, employees need to rely on each other to own their role and make things work. You may ask candidates to talk about a project they either ran or participated in, and how they overcame challenges in the process.
- **Curiosity.** Companies can only flourish if they change and adapt to the market. In order to achieve this adaptation, employees must be curious and creative and willing to push the boundaries to make change. You may ask candidates about the last thing they learned and why they chose to pursue that knowledge. If employees are curious in their personal lives, they'll likely be curious in the workplace as well.
- **Polish.** The way candidates presents themselves can say a lot. As you interview, take note of how candidates dress, how they speak, and how they put together resumes, cover letters, and sample work products. If they don't provide polished work during the interview process, it's likely they won't in their job either.

READ MORE

First Round's compilation, "The Best Interview Questions We've Ever Published" is an excellent source of not only interview questions but perspective on candidate evaluation (and, for those who are interviewing, the intent behind questions).

What You Shouldn't Ask

Perhaps the first step in developing effective interview questions—both in forming questions and in coaching inexperienced interviewees—is to know what's off limits. As advised in a SHRM article, you need to be aware of both state and federal laws when considering interview questions and procedures (Note: Onley, Dawn. "These Interview Questions Could Get HR in Trouble." *SHRM*. 19 June 2017. Web. 10 July 2018.). For perspective, California Department of Fair Employment & Housing guidelines recommend that "employers limit requests for information during the pre-employment process to those details essential to determining a person's qualifications to do the job (with or without reasonable accommodations)." (Note: The Department of Fair Employment and Housing. "Employment Inquiries: What Can Employers Ask Applicants and Employees." Web. 10 July 2018.)

The best policy is to consider questions that relate to protected categories—that is, those that reference a candidate's age, race, gender, religion, sexual orientation, etc.—off limits. Even if they're not illegal per se in a particular state, they may be seen as a discriminatory hiring practice that negatively impacts the employer's brand and recruiting efforts.

Phone Interviewing

Quite a few job applicants look "good on paper," meaning that their resumes are impressive. Once you actually speak with them, however, it may become obvious that they don't really meet the requirements of the job. Alternatively, a moderately attractive applicant might turn out to have personal qualities and abilities that are better than they appeared on paper.

A phone interview is a second level of screening used to reduce the pool of qualified candidates to a manageable number that will be invited in for a face-to-face interview. A phone interview can be voice only or voice and video, using technologies such as Skype. For both interviewee and candidate, the preparation is similar to preparing for a live interview. The basic 5-step process (from the interviewer's perspective) is as follows:

1. Review the job description and job specifications
2. Prepare and validate a set of questions (for candidates: anticipate & prepare for questions)
3. Review submitted materials, including application form, cover letter and resume

4. Conduct the interview
    1. Open the interview
    2. Ask your prepared questions and any follow-up questions based on the candidate's responses
    3. Invite candidate questions
    4. Close interview
5. Summarize the interview. For the interviewer, that involves writing a candidate evaluation. For the candidate, that involves summarizing notes and writing a follow-up.

Keep in mind that active listening and effective interpretation and note-taking are essential interview skills. This is especially true when interviewing a large number of candidates—it can get tricky remembering who said what. Keeping notes will help you make a final decision as you weigh candidates against one another.

If there will be a video element to the phone interview, there's an additional level of planning and coordination, including exchanging user names, issuing and accepting connections and testing technology. (See Module 9: Communicating Through Technology for further assistance.)

PRACTICE QUESTIONS

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LEARN MORE

For perspective on how to conduct a phone interview, view this U.S. Department of Labor Recruiter Training video. In this video, you'll hear an abbreviated (six minute) interview with a West Virginia University Journalism major. The video illustrates the primary interview steps and interpersonal interactions, including introduction, setting the agenda, inviting questions, and establishing next steps.

VIEW MORE

University of Hartford Barney School of Business staging of a mock phone interview with student evaluation:

Face-to-Face Interviewing

A face-to-face interview is generally the final step in the interview process. In theory, a candidate who has made it this far is qualified—perhaps highly qualified—on paper. From the standpoint of the interviewer, the objective is to determine which one of a short list of candidates is the best choice.

After preliminary interviews are completed, HR can provide the hiring manager with a set of promising applicants who have the skills, credentials, and background to fit the manager's needs. Now the hiring manager can sit down with each candidate and get to know her through a personal interview. Often, hiring managers will conduct a second interview after narrowing down their options to just a few candidates. They may also include other team members in the interviewing process and/or conduct tests to determine whether candidates have the level of technical skill they need for the job.

It takes some skill and knowledge to interview a job applicant effectively. It's important to do the job right, though, because the costs of hiring someone are substantial, and many hires leave within one year. Some effective interviewing techniques include the following:

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- **Planning and preparation.** Before starting an interview, it's important for a manager to have read the applicant's resume, prepared questions, and know what he wants to learn during the interview. It's also helpful to set a time limit for the interview.
- **Understanding the job.** In some cases, managers don't have direct experience doing the job for which they're hiring. When that happens, it's important for the manager to talk with people who are doing the job now as well as direct supervisors and teammates. What are the most important qualities, skills, and qualifications required for the job? Are there specific situations for which the new hire should be prepared? Knowing about the job makes it easier to ask the right questions.
- **Connecting with the applicant.** Most people are nervous at job interviews, and it's important to set the applicant at ease so she can put her best foot forward. Instead of just saying "Don't be nervous," good managers spend some time chatting with the candidate and explaining the interview process.
- **Active listening.** Managers want to learn about the candidate, so active listening is very important. Managers need to show that they're interested by nodding, asking follow-up questions, smiling, or otherwise using body language to encourage the candidate to share more information.

MOCK INTERVIEW

Listen to the following mock interview for perspective on how to conduct an interview. The interviewer's comments are a teaching aid for both interviewer and candidate, providing a format to follow and insight into the objective of the question and how to interpret the responses. Human Resource professional Richard Mercer deconstructs a mock interview with Radford University senior Noell Lee:

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The key takeaway from this video is to attempt to discover what makes a candidate unique and compelling. The elevator speech point Mercer makes is good coaching for a candidate and something to listen for an interviewer.

PRACTICE QUESTIONS

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For tips on how to prepare for an interview as a candidate, watch Harvard Office of Career Services Assistant Director Linda Spenser's "How to Ace an Interview" video:

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For a specific example of a interview evaluation form, see Society for Human Resource Management's (SHRM) Candidate Evaluation Form, with scoring based on 12 categories and ratings on a scale of 1 (Unsatisfactory) to 5 (Exceptional).

SELECTING A CANDIDATE

What you'll learn to do: Identify the key steps in selecting a new employee.

As *Business News Daily* B2B Staff Writer Sammi Caramela notes "The hiring process is more complex than choosing the right person for the job; it's attracting and securing the best candidates, whose values align with your company's mission and principles (Note: https://www.businessnewsdaily.com/5827-employer-hiring-mistakes.html)." In this section, we'll discuss common perception errors and decision mindset tips and review job offer formats and considerations.

LEARNING OUTCOMES

- Discuss methods of selecting the best candidate.
- Describe how to complete a job offer

Selection

When reviewing a final slate of candidates, it's important to be aware of the potential for perception errors on the part of both interviewer and candidate. The onus is on the interviewer to check his or her assumptions and make sure a candidate understands the position, culture and operating dynamics.

Implicit or unconscious bias, covered in depth in Module 13: Social Diversity in the Workplace, is a factor in the selection process as well. Briefly stated, implicit bias reflects the fact that we are often unaware of the divergence between our conscious attitudes and our unconscious beliefs. This divergence is a blind spot that can distort our perceptions of candidates. Key perspective point: it's not always a matter of how we perceive those who are different from us. For example, research at Yale found that both male and female scientists rated "female" lab scientist applicants significantly lower than the "male" candidates in competence, hireability, and whether the scientist would be willing to mentor the student. The catch: the resume in both cases was the same; the only difference was the name: male or female (Note: https://blogs.scientificamerican.com/unofficial-prognosis/study-shows-gender-bias-in-science-is-real-heres-why-it-matters/). The takeaway is that we all have internalized cultural stereotypes and need to cultivate an awareness of potential gender, ethnic, or other biases to avoid having those stereotypes distort our judgments.

PRACTICE QUESTION

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Research also suggests that we tend to put too much faith in our ability to evaluate others. A common mistake is judging candidates based on a first impression or "likeability." As IBM Smarter Workforce business development executive Jason Berkowitz notes: "It's so easy to assume that a firm handshake and good eye contact means someone is competent across the board."

Because the process can be complicated, it's important to have very concrete reasons for choosing one candidate over another. For example, saying "Mary fits into the team better than Sally" is likely to lead to Sally's feeling that she has lost a popularity contest. A better option is to have a checklist of qualifications that can be shared with job candidates. If you can show Sally that Mary has stronger IT skills, more management experience, and important marketing knowledge, it will help Sally understand why Mary really is the better person for the job.

Here are a few additional tips to improve evaluation effectiveness:

- Focus evaluations on the job criteria to avoid being distracted by superficial factors
- Seek candidate evaluation input from multiple people; compare notes and discuss observations
- Be aware of any attempts to cater to interviewer interests and preferences or leverage common ground
- Be aware of making conclusions—either favorable or unfavorable—based on factors that aren't related to job performance, i.e., application, resume, or GPA
- Related point: question assumptions about what factors (accomplishments and characteristics) correlate with employee success

Discussion of how to select the best candidate also has to factor in the candidate's perceptions and potential perception errors. Given that, the final action item is doing a reality check; that is, providing the candidate with a realistic job preview. Failing to do this is a common hiring error that B2B Staff Writer Sammi Caramela refers to as "lacking in transparency." In a series of posts on retail industry interview questions, Workforce management support provider Deputy emphasizes the importance of clarifying expectations, noting that a candidate's attributes and enthusiasm are only part of the equation. Tip: "If the job involves a variety of shifts and incentive-based pay, it's best to address that up-front." (Note: https://www.deputy.com/blog/77-retail-interview-questions-to-hire-the-right-candidate#suitability) Sample questions:

- What type of schedule are you interested in?
- Would you be available to work extra shifts?
- Do you have any classes or other part-time jobs or commitments that may affect your work availability?
- Are you willing to work nights, weekends, and the occasional overnight inventory shift if necessary?

The upside of transparency: Research cited in *Fundamentals of Human Resource Management* indicates that providing candidates with a realistic job preview prior to extending a job reducers turnover without impacting acceptance rates.

The Job Offer

Once the hiring manager decides who she'd like to hire, the HR department makes an offer. Typically, a job offer includes information about salary and benefits as well as details about the job requirements. If the candidate is interested, he will need to sign a contract or otherwise accept in writing before taking the job—usually a letter or email is acceptable until the employee's first day.

Making the Offer

If the recruitment and selection process has been conducted with integrity and transparency on both sides, the final step is almost a formality. That said, a job offer is a contractual document and it's important to cover the bases. The Society for Human Resource Management (SHRM) provides the following checklist of details to include in an offer, with comments drawn from attorney Joshua Mates' "14 Things Your Job Offer Letter Must Have to Be Effective" article (Note: https://www.shrm.org/resourcesandtools/hr-topics/talent-acquisition/pages/offer-letters-effective-employment-agreements.aspx) for SHRM:

- Job title
- Department, manager's name
- Start date
- Hours of work/schedule
    - Indicate whether the position is full- or part-time and specify the expected work schedule.
- Status (full time, part time, regular, temporary, specific duration)
- Exempt vs. nonexempt status
    - Employees need to be properly classified as either exempt or nonexempt from federal and state overtime requirements to avoid penalties or claims for unpaid wages.
- Rate of pay (hourly, weekly, or by pay period) and pay period frequency
- Offer contingencies
    - Identify any offer contingencies such as a background check, drug testing, reference check, and satisfactory proof of the employee's right to work in the U.S., as required by law.
- Paid leave benefits
- Eligibility for health/welfare benefits plans
- Work location
- If travel is involved, approximate percent of travel required
- At-will employment statement
    - State that either the employee or the company can terminate the relationship at any time, with or without cause or advance notice. Avoid language that could be interpreted to form a long-term commitment, including "soft statements" such as "looking forward to a long relationship."

SHRM also proposes attaching the following if/as relevant:

- Benefits overview/summaries
- Job description
- Blank Form I-9 (bring on start date for completion) with supporting documents
- An employment agreement, non-compete or other restrictive covenants (bring on start date for completion)

- Self-identification form (bring on start date for completion)
- Emergency contact form (bring completed on start date)
- If travel is involved, summary of company's reimbursement processes

LEARN MORE

To view sample offer letters (and access a range of Human Resource-related resources), visit the SHRM website and click on the Resources & Tools tab.

The offer process itself is straightforward: either a Human Resource representative or the hiring manager will extend an offer of employment. If communicated verbally, this will be followed by a written offer of employment. The candidate will be given a set amount of time to respond—either to accept, reject, or negotiate—the offer. In practice, negotiations are often conducted prior to issuing a formal job offer.

PRACTICE QUESTIONS

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PUTTING IT TOGETHER: RECRUITING AND SELECTING EMPLOYEES

The essence of recruiting is expressed in researcher, advisor and bestselling author Jim Collin's classic recommendation: "Get the right people on the bus." This analogy, presented in his 2001 bestseller, *Good to Great*, reflects the realities of operating in a dynamic and disruptive environment. In the years since, this insight has been widely recognized as a critical business success factor. Indeed, our environment has become even more of a chaos or opportunity situation, with trends and technology developments favoring companies that find and hire the "right" people. The key question, then, is how do you identify the "right" people? Organizational design consultant Karen Wunderland provides this summary of Collins' five discovery questions:

1. Does the person share your organization's core values?
2. Does this person "get it" so they don't need tight management?
3. Does this person have exceptional ability—the potential to be one of the best in his or her field?
4. Does this person understand the difference between having a job and holding a responsibility? You want folks who think three steps ahead, feel a sense of responsibility—and if they see a hole, they fix it.
5. Can you answer "yes" to this question: Knowing everything you now know about this person, would you hire them again? (Note: http://wunderlin.com/get-the-right-people-on-the-bus-2/#.WwnQqIMvwb2)

Perhaps one of the most powerful lessons is not to make a hiring decision based on hope. As expressed in the Callibrain video review: “When in doubt, don’t hire. Keep looking.” The candidate equivalent was expressed by former Apple & Pixar Animation Studios CEO Steve Jobs in his legendary Stanford commencement address:

> “Your work is going to fill a large part of your life, and the only way to be truly satisfied is to do what you believe is great work. And the only way to do great work is to love what you do. If you haven’t found it yet, keep looking. Don’t settle.”

As Psychology Professor, researcher, and author Angela Duckworth demonstrated in *Grit: The Power of Passion and Perseverance*, this passion is what translates into grit and sustains the commitment to succeed despite setback or failure. Indeed, it’s this passion that builds successful organizations and meaningful lives. As Collins noted:

> “People are not your most important asset…the right people are.”

For a 5 minute distillation of *Good to Great*, watch Callibrain’s sketchnote video review:

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Angela Duckworth’s Grit Test: https://angeladuckworth.com/grit-scale/